



WE HELP YOU MAKE IT™

US Foods Online and Mobile Inventory User's Manual

December 2020



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Document Updates

December 2020	List Management Application - changes applied throughout the document	
July 2017	Audit Inventory Lists	Page 53
October 2014	Inventory Cost Report – Extended	Page 64

US Foods Inventory Overview

- Real time costing of all recorded US Foods products
- Supports non-US Foods products
- Compare costs between recorded inventories
- Generate orders automatically based on pre-established par values. These orders can be reviewed and modified prior to submission.
- Identify high cost products within your inventory.
- Identify and reduce ordering levels for over-stocked items.
- Compare pricing of current inventories to past inventories.
- Create general ledger reports for your company's accounting department
- Use the mobile app on a tablet or smart phone to record the inventory

US Foods Inventory Reports

Inventory Worksheet

- Print any shopping list in this format. Use multiple columns to record inventory or order

Inventory Cost:

- Description - Ascending
- Extended Value – Descending
- GL# with Subtotal Detail
- GL# without Subtotal Detail
- Line # - Ascending
- Product # - Ascending

Inventory Cost Comparison

Select separate dates for the same inventory list.

Compare:

- All products
- Price changes only

Sort by:

- Percent price change – descending

Inventory Cost Report – Extended

The “Inventory Cost Report – Extended” was created for owner/managers of 2 or more locations who want to get the most up to date inventory reports from all locations.

This extended cost report allows managers to:

- Pull all active inventory reports for a 5 day date range across multiple locations and divisions
- Pull all key report elements in one Excel / CSV report including

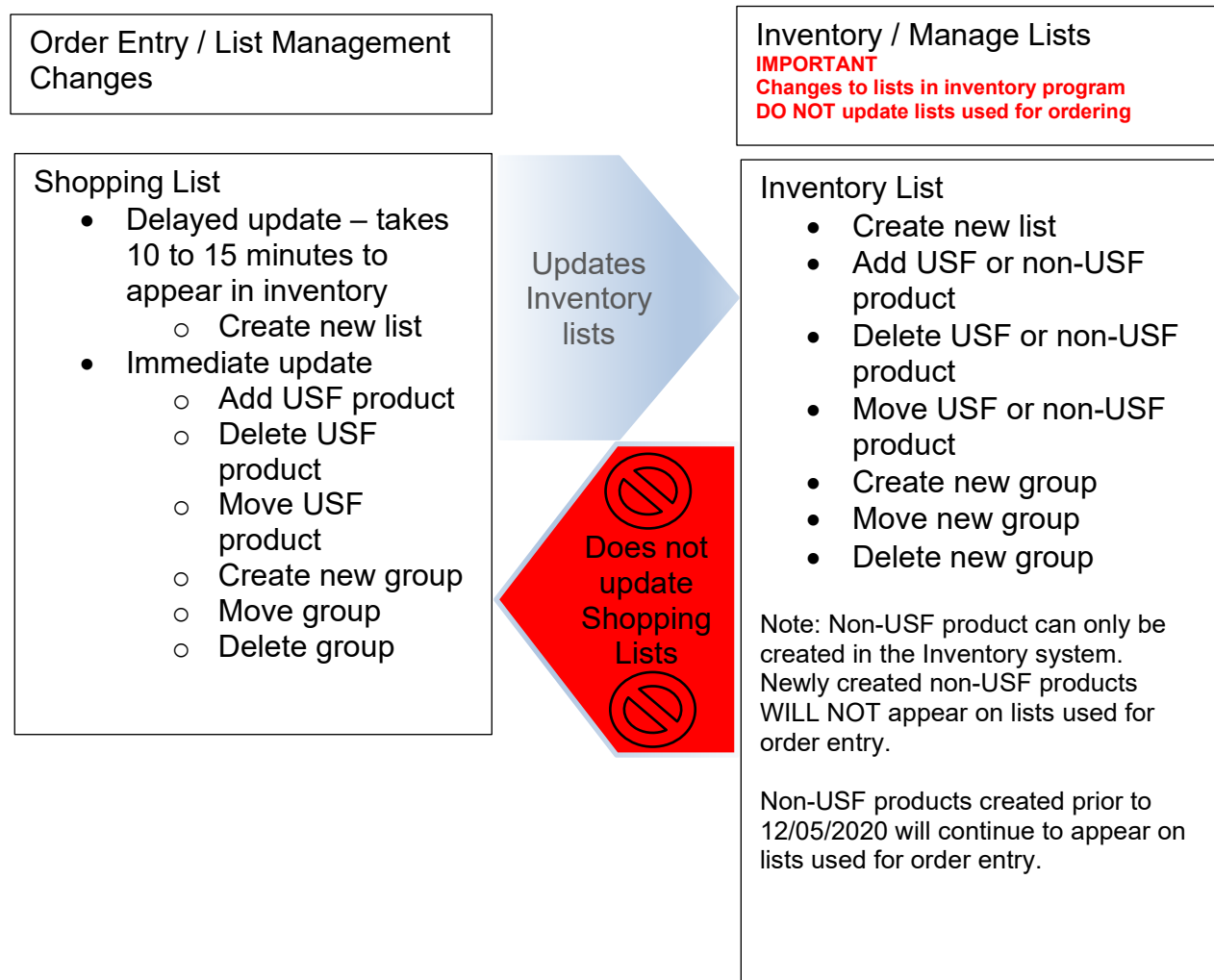
Eliminates the need for location managers to email completed inventories

List Management changes

As of December 2020, there is a new process for updating lists used for ordering and taking inventory. This document has been updated to reflect this change in process

- **US Foods products** – If you wish to keep ordering lists in synch with lists used for inventory, the following changes must be made in the List Management application.
These changes will automatically update the lists used for inventory:
 - Creating new lists – you must wait 15 minutes for new lists to appear in the inventory program
 - Adding USF products
 - Deleting USF products
 - Moving USF products
 - Adding, moving or deleting product groups
- **Non-USF products** – Changes to and creation of non-USF products can only be made in the Inventory program. **These newly created non-USF products will not appear on lists used for ordering.** Additionally, changes made to USF products in the Inventory program WILL NOT update lists used for ordering.

Below is a process flow of how List Management works with the Inventory system.



Before you begin

If this is your first time:

In the List Management application:

1. Create a new list to be used to create orders and record inventory

In the Inventory program:

2. Create GL Codes (optional)
3. Assign GL Codes (optional)
4. Edit inventory units (optional)
5. Create vendors (optional)
6. Create non-US Foods products (optional)

Note: Newly created non-US Foods products will no longer show up on the shopping list used for ordering

If you are a returning user:

In the List Management application for USF products:

1. Select a list to be used to record inventory
2. Delete products no longer being inventoried.
3. Update products location on Shelf to Sheet lists
4. Add new USF products since last inventory.

In the Inventory program:

5. Create new non-US Foods products (optional)

Note: Newly created non-US Foods products will no longer show up on the shopping list used for ordering Update all new products:

- Add GL Codes (if used)
 - Edit inventory units
6. Make sure all products to be inventoried are on the selected Shopping List.

Important: You cannot add additional products to the list once you click on "Lists" and then "Create Inventory". Make absolutely sure all products are on the list before you create the inventory.

Important - Read before starting

Inventory specific data elements

Inventory specific data elements are:

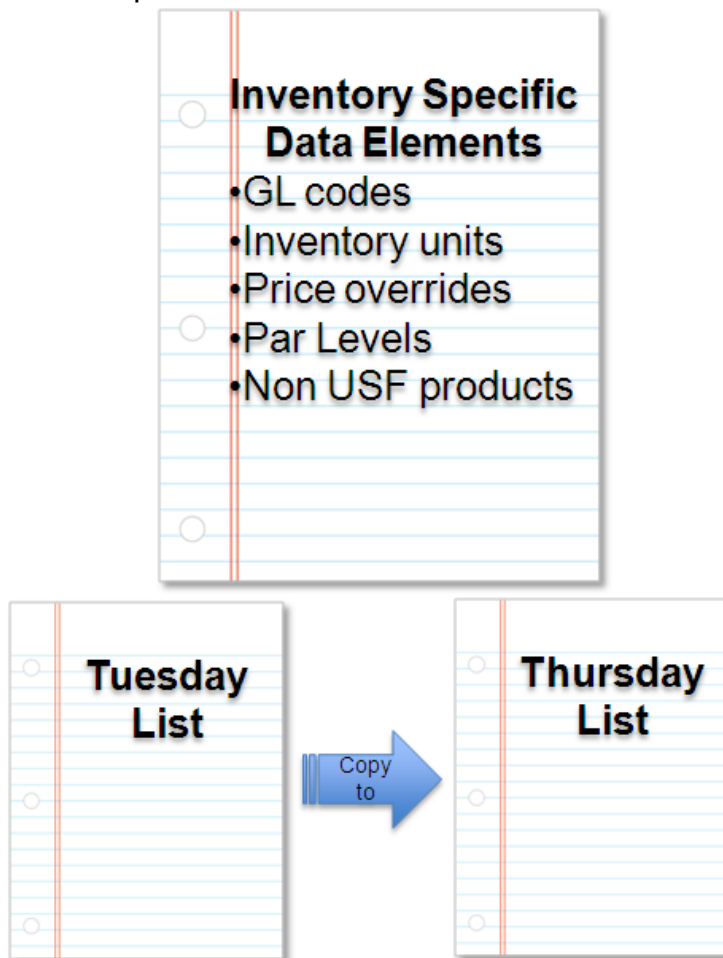
- GL codes
- Inventory units
- Price overrides
- Par Levels
- Non USF products

These data elements are part of the Inventory List. They are not attached to the individual product number. **These data elements can only be edited in the Inventory program.**

If a new list is created from scratch, the inventory data elements must be re-entered for each product. **These data elements can only be created in the Inventory program.**

To avoid re-entering this information when a new list is created, copy the original list with the inventory specific data elements.

Edit the copied list as needed. Remember t



Inventory reports are linked to lists

Inventories are linked to the list that created them.

Manage Lists

Add New List

» Inventory 2013
» Inventory 2014
» Snack Bar Inven / Order

Manage Inventories

Create New Inventory

List Name	Create Date
» Inventory 2014	01/31/2014
» Inventory 2014	01/01/2014
» Snack Bar Inven / Order	12/14/2013
» Inventory 2013	12/11/2013
» Inventory 2013	12/01/2013
» Inventory 2013	11/30/2013
» Inventory 2013	11/25/2013
» Inventory 2013	11/01/2013

Manage Lists

Add New List

» Inventory 2013
» Inventory 2014
» Snack Bar Inven / Order

Manage Inventories

Create New Inventory

List Name	Create Date
» Inventory 2014	01/31/2014
» Inventory 2014	01/01/2014
» Snack Bar Inven / Order	12/14/2013
» Inventory 2013	12/11/2013
» Inventory 2013	12/01/2013
» Inventory 2013	11/30/2013
» Inventory 2013	11/25/2013
» Inventory 2013	11/01/2013

Deleted lists and associated inventories CANNOT be restored if deleted in error.

Note: As a safety precaution – you cannot delete an inventory list from the List Management application. You must do it from the Inventory program.

Create an Inventory - Overview

Online and Mobile Process

1. **US Foods products** - Using the List Management application, update the shopping lists that will be used to record the inventory. Add, delete and move US Foods products.
2. **Non-US Foods products** - Audit and update the selected Inventory List in the Inventory program. Add, delete and move non-USF products. For both USF and non-USF products:
 - Update Inventory Units
 - Create and assign GL codes for non-USF products
 - Create and assign GL codes for USF products using Ecommerce GL coding

Skip to Step 6 when using the mobile app

Online process

3. Print an inventory worksheet to record the inventory by clicking on Lists>Inventory Worksheet
4. Record the inventory on the worksheet.
5. Enter the recorded inventory. Only one inventory per list can be entered on a given date.
Note: Once you begin entering the inventory, you cannot add products to the shopping list. Make sure all products are on the selected Shopping List.

Mobile app process

6. Create an inventory
7. Enter the inventory on the mobile app.
8. Sync the mobile app

Online and Mobile process

9. Select and print the desired reports
10. Print an Inventory Cost Comparison report to compare price changes for inventories recorded on different days.

Create an Inventory - Details

Step 1 – Update US Foods products

Using the List Management application (see Appendix for details), update the shopping lists that will be used to record the inventory. Add, delete and move US Foods products using the List Management Application.

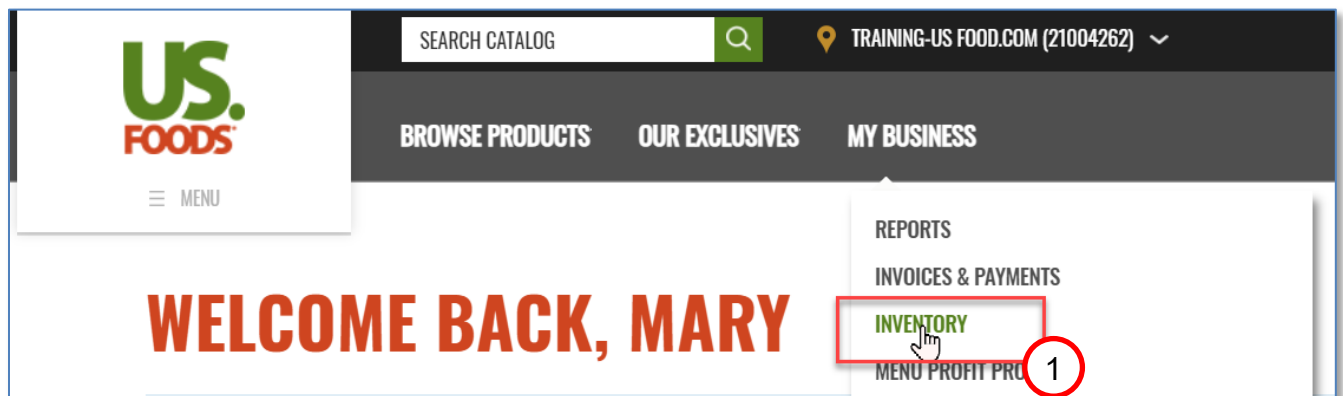
Step 2 – Update Non-US Foods products

Audit and update the selected Inventory List in the Inventory program. Add, delete and move non-USF products in the Inventory Program.

For both USF and non-USF products:

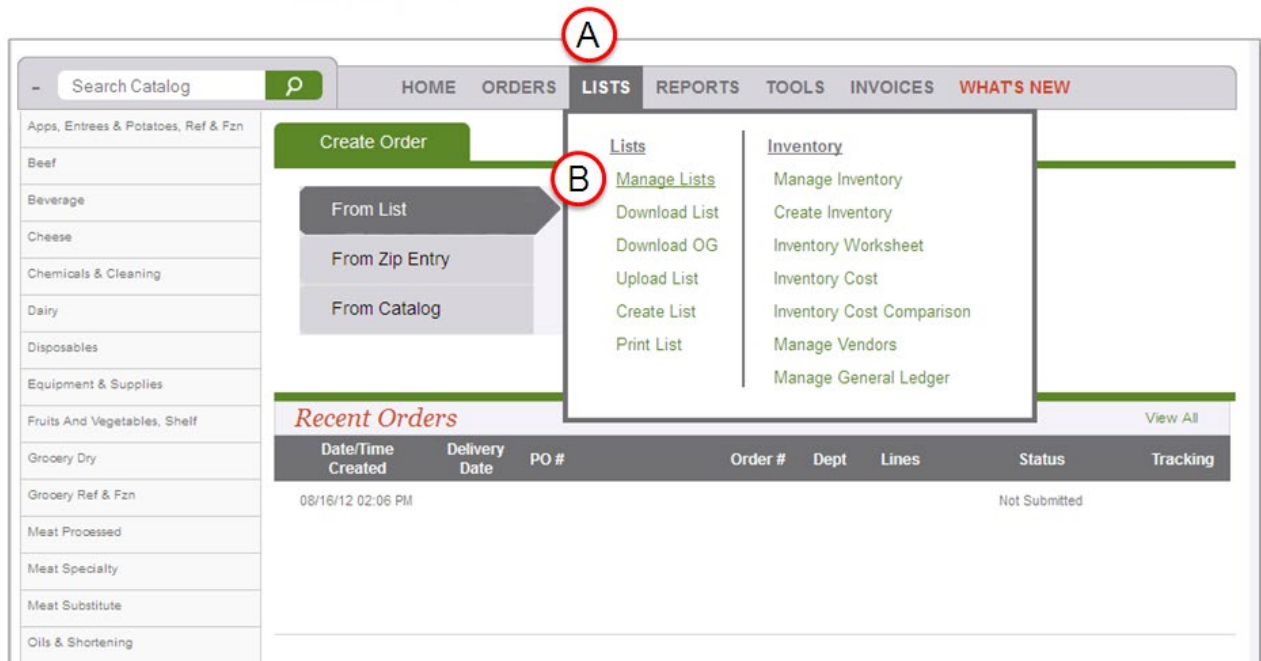
- Update Inventory Units
- Create and assign GL codes for non-USF products
- Create and assign GL codes for USF products using Ecommerce GL coding

1. From the “My Business” menu on the Home page of US Foods Online, select **My Business> Inventory**.



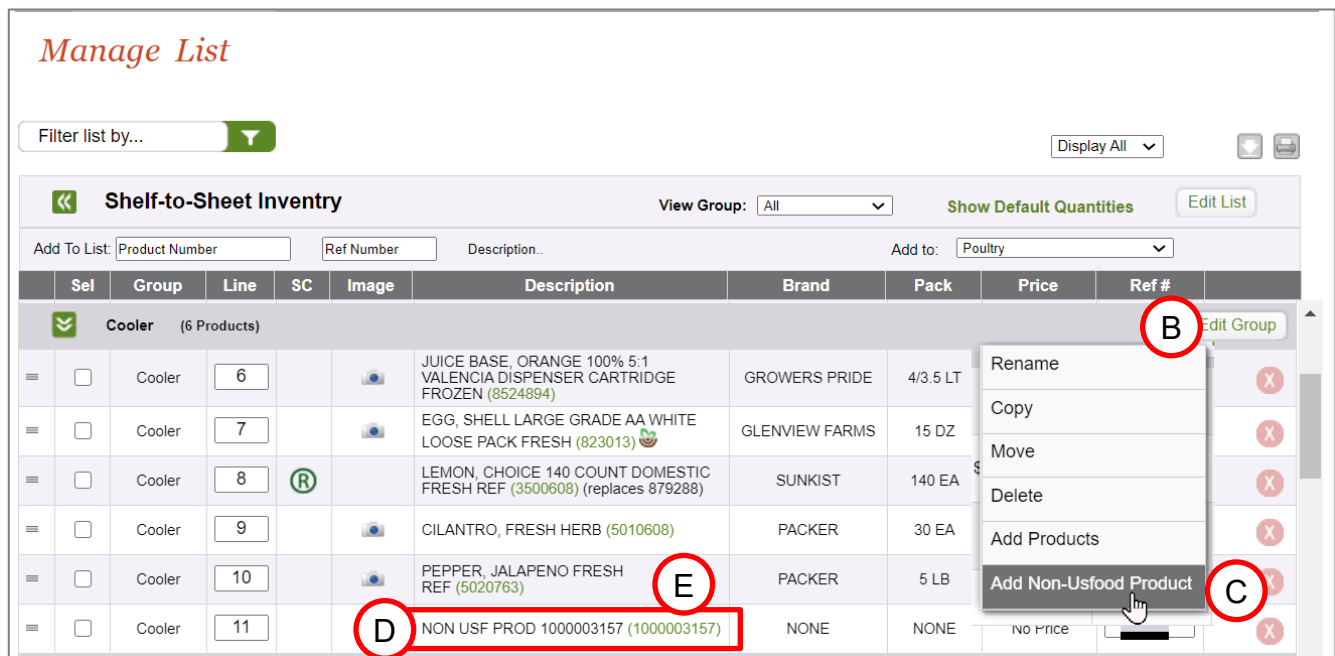
2. From the Inventory program, select **Manage Inventory Lists**

- A. Click on Lists
- B. Click on Manage List



3. Add a non-USF product

- A. Select and open the list to edit.
- B. Click on Edit Group
- C. Click on Add Non-Usfoods Product
- D. A new NON USF PROD will be added to the Group
- E. Click on the NON USF PROD number



- F. The Non USF Product Detail screen will appear.
- G. Enter product details
- H. Click on **Save Updates**.
- I. Click **Close**.

Non USF Product Detail

Printer Friendly
Close

Description: Fresh Orange Juice
Product #: 1000003157
Reference:
Brand: Local
Mfr. Prod. #:
Avg. Net Wgt.: 2
Pack Size: 1 quart

☐ Kosher
☐ Partial Units Available
☐ Special Order
☐ Just-In-Time (JIT)

Inventory Detail

Group: Cooler
Inv. Unit Desc: Bottle
Reference:
Inv. Units / Full: 1
Vendor: Napoli
Inventory Price: 5.00 per QT
General Ledger: Groceries
Price Override: ☒

Par Stock Quantities

Quantities should be placed in the space(s) next to the day(s) you place your order.

Sun: 3
Mon: 1
Tue: 1
Wed: 1
Thu: 1
Fri: 3
Sat: 3

Save Updates

- J. The product details will appear on the list. **The new non-USF product will not appear on the list used for order entry.**

Manage List

Filter list by...
Display All

Shelf-to-Sheet Inventory

View Group: All
Show Default Quantities
Edit List

Add To List: Product Number
Ref Number
Description..
Add to: Poultry

Sel	Group	Line	SC	Image	Description	Brand	Pack	Price	Ref #
<input checked="" type="checkbox"/>	Cooler	6			JUICE BASE, ORANGE 100% 5:1 VALENCIA DISPENSER CARTRIDGE FROZEN (8524894)	GROWERS PRIDE	4/3.5 LT	\$175.51 CS	
<input checked="" type="checkbox"/>	Cooler	7			EGG, SHELL LARGE GRADE AA WHITE LOOSE PACK FRESH (823013)	GLENVIEW FARMS	15 DZ	\$21.68 CS	Use for breakf
<input checked="" type="checkbox"/>	Cooler	8	®		LEMON, CHOICE 140 COUNT DOMESTIC FRESH REF (3500608) (replaces 879288)	SUNKIST	140 EA	\$51.61 CS	Catering only
<input checked="" type="checkbox"/>	Cooler	9			CILANTRO, FRESH HERB (5010608)	PACKER	30 EA	\$18.52 CS	Par 3
<input checked="" type="checkbox"/>	Cooler	10			PEPPER, JALAPENO FRESH REF (5020763)	PACKER	5 LB	\$15.41 CS	
<input checked="" type="checkbox"/>	Cooler	11			Fresh Orange Juice (1000003157)	Local	1 quart	\$5.00 QT	

4. Delete a non-USF product

- Select and open the list to edit.
- Open the Group that contains the non-USF product to delete
- Select the Non-USfoods Product to delete

Manage List

Assign To Selected: Delete Selected **D**

Filter list by... Display All

Shelf-to-Sheet Inventory View Group: All Show Default Quantities Edit List

Add To List: Product Number Ref Number Description.. Add to: Poultry

Sel	Group	Line	SC	Image	Description	Brand	Pack	Price	Ref #	
	Cooler	6			JUICE BASE, ORANGE 100% 5:1 VALENCIA DISPENSER CARTRIDGE FROZEN (8524894)	GROWERS PRIDE	4/3.5 LT	\$175.51 CS		
	Cooler	7			EGG, SHELL LARGE GRADE AA WHITE LOOSE PACK FRESH (823013)	GLENVIEW FARMS	15 DZ	\$21.68 CS	Use for breakf	
	Cooler	8			LEMON, CHOICE 140 COUNT DOMESTIC FRESH REF (3500608) (replaces 879288)	SUNKIST	140 EA	\$51.61 CS	Catering only	
	Cooler	9			CILANTRO, FRESH HERB (5010608)	PACKER	30 EA	\$18.52 CS	Par 3	
C	Cooler	10			PEPPER, JALAPENO FRESH REF (5020763)	PACKER	5 LB	\$15.41 CS		
	Cooler	11			Fresh Orange Juice (1000003157)	Local	1 quart	\$5.00 QT		E

- Click on Delete Selected.
- You can also click on the delete icon.

Update inventory units (optional)

Inventory Units can be edited based on how you want to count units of a product.

- A. To update an inventory unit, click on the product number to access the Product Detail screen.

DESSERT (8 Products)							
≡	<input type="checkbox"/>	DESSERT	71		PIE, BOSTON CREAM UNSLICED THAW & SERVE FROZEN DOME LID (4571899)	HILLTOP HEARTH	6/33 OZ
≡	<input type="checkbox"/>	DESSERT	72		PIE, CHOCOLATE CREAM NO-SUGAR-ADDED 10" THAW & SERVE FROZEN (372763)	HILLTOP HEARTH/DEVONSHIRE	4/43 OZ
≡	<input type="checkbox"/>	DESSERT	73		PIE, PECAN SOUTHERN UNSLICED BAKED FROZEN (4568747)	HILLTOP HEARTH	6/36 OZ

- B. Click on the Inventory tab.

Details

Nutritional

Inventory ⌵

Par Stock

Standing Order

Inventory Detail

Group: DESSERT

Reference:

Vendor: US Foods

General Ledger: Groceries

Inv. Unit Desc: CS

Inv. Units / Full: 1

Inventory Price: 55.55 per CS

Price Override: ☒

- C. Enter the new "Inventory Unit Desc" and the desired number of units/case.

Details

Nutritional

Inventory ⌵

Par Stock

Standing Order

Inventory Detail

Group: DESSERT

Reference:

Vendor: US Foods

General Ledger: Groceries

Inv. Unit Desc: Pies

Inv. Units / Full: 6

Inventory Price: 55.55 per CS

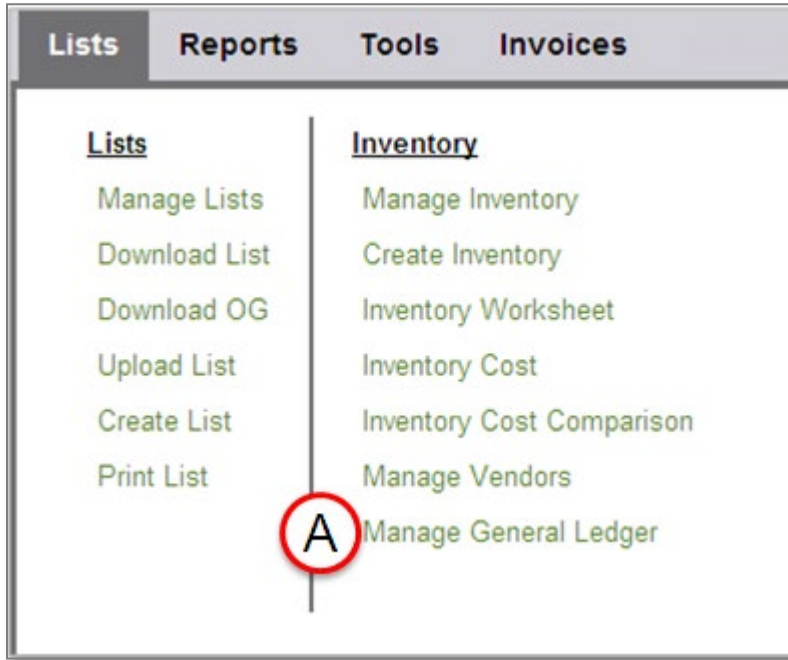
Price Override: ☒

- D. Click "Save" then close the window

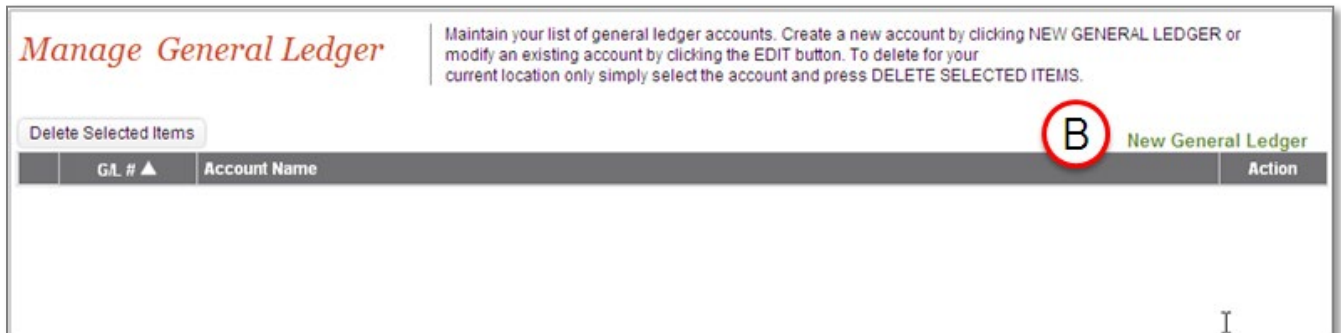
In this example, the original inventory units were "1 case". They were updated to "6 pies per case".

Create and Assign GL Codes (optional)

A. From the Lists menu, click on Manage General Ledger.



B. Click on the New General Ledger link.



- C. Enter the GL # and Account Name.
- D. Click on Save to Current Location Only.
- E. Choose Save to All Locations if you want all assign the new GL codes to all customer numbers attached to your user ID.

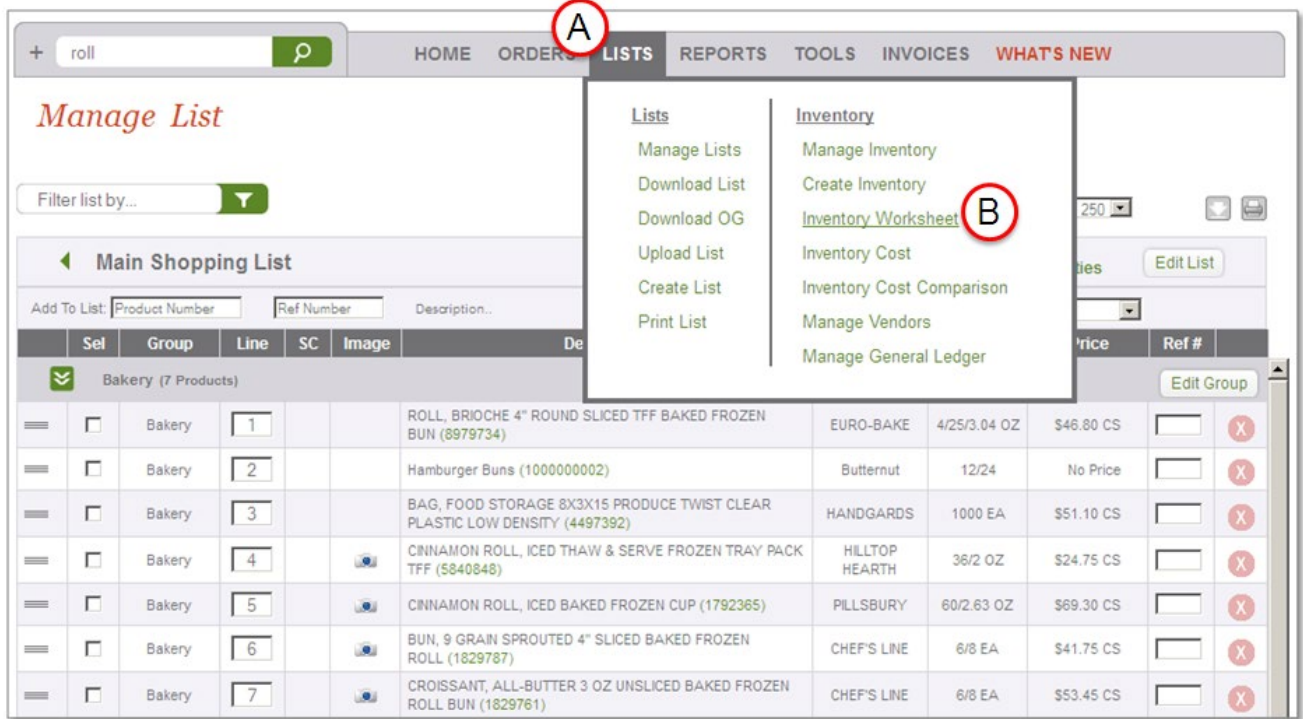
- E. Select Yes to confirm and continue.

Repeat process until all GL Codes and Account Names have been entered.

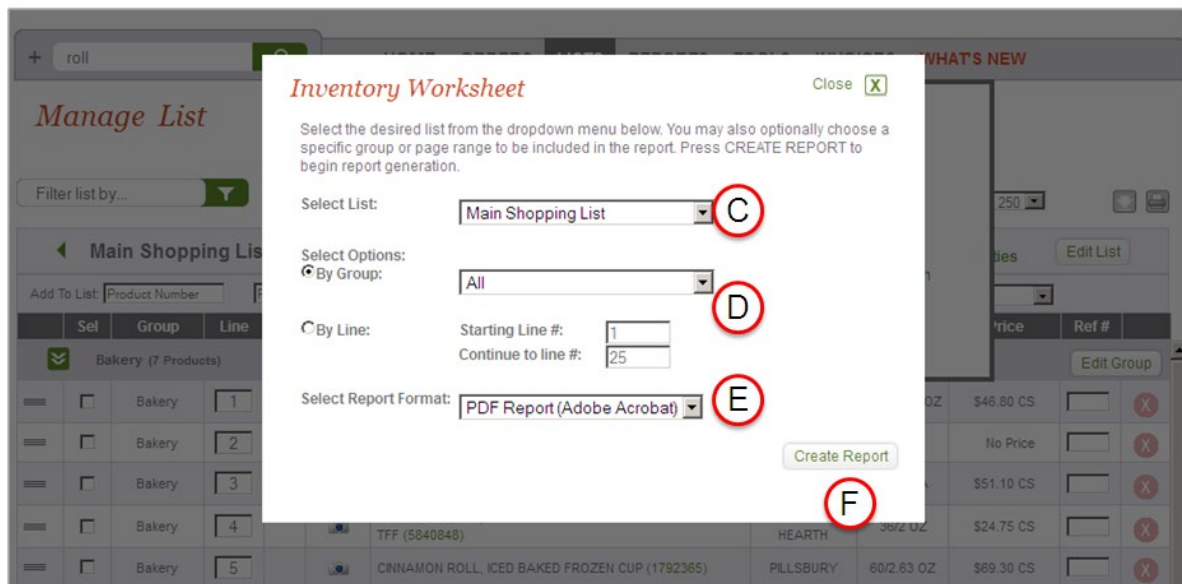
Manage General Ledger			Maintain your list of general ledger accounts. Create a new account by clicking NEW GENERAL LEDGER or modify an existing account by clicking the EDIT button. To delete for your current location only simply select the account and press DELETE SELECTED ITEMS.
Delete Selected Items			New General Ledger
	GL # ▲	Account Name	Action
<input type="checkbox"/>	10Meat	Meats	Edit
<input type="checkbox"/>	15Prdc	Produce	Edit
<input type="checkbox"/>	20Groc	Groceries	Edit
<input type="checkbox"/>	30Chem	Chemicals and Cleaning	Edit
<input type="checkbox"/>	40Papr	Paper	Edit
<input type="checkbox"/>	50Eqmt	Equipment	Edit

Step 3 - Print a worksheet to record the inventory (skip to step 6 if using the Mobile app)

- A. Click on List
- B. Click on Inventory Worksheet



- C. Verify the Shopping List name
- D. Choose the print options
 - By Group - Select All or the specific group to print
 - By Line – Select starting and ending line number
- E. Choose the report format:
 - PDF or
 - Excel
- F. Click on Create Report



- G. Once the worksheet appears, click on **File** from the main browser menu
- H. Click on **Print**
- I. Use the worksheet to record the inventory

The screenshot shows a web browser window displaying the 'US Foods Manage List' page. The browser's menu bar includes File, Edit, View, History, Bookmarks, Tools, and Help. The address bar shows a URL for downloading a report. The page title is 'Shopping List - Main Shopping List' for Customer: TRAINING CUST-AUSTIN (83941906) and Division: AUSTIN (3023).

Annotations on the screenshot:

- G**: Points to the 'File' menu in the browser.
- H**: Points to the 'Print' option in the browser's menu.
- I**: Points to the 'Shopping List - Main Shopping List' table.

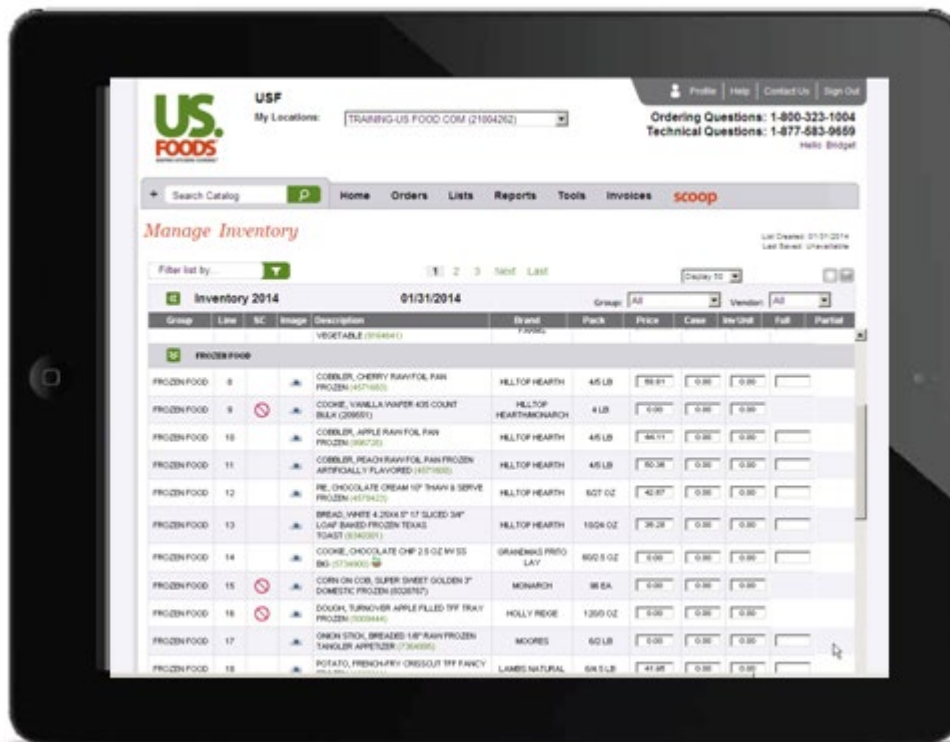
Product Line #	Status	Description	Unit	Brand Ref #	Pack Size	Last Buy Date	OnHand/Order(Line#)	\$/Unit	\$/Part	Unit of Measure	GL	VN
Bakery												
8879734		ROLL, Brioche 4" ROUND SLICED TFF BAKED FROZEN BUN		EURO-BAKE	4/25/14 OZ	(1)					N/A	N/A
100000000		Hamburger Buns		Butterfly	12/24	(2)					N/A	N/A
4487382		BAG, FOOD STORAGE 5X315 PRODUCE TWIST CLEAR PLASTIC LOW DENSITY		HANDGARD	1000 EA	(3)					N/A	N/A
5040548		CINNAMON ROLL ICED THAW & SERVE FROZEN TRAY PACK TFF		HILLTOP HEATH	36/2 OZ	(4)					N/A	N/A
1782365		CINNAMON ROLL ICED BAKED FROZEN CUP		FILLBURY	60/2.53 OZ	(5)					N/A	N/A
1829787		BUN, 9 GRAIN SPROUTED 4" SLICED BAKED FROZEN ROLL		CHEFS LINE	6/8 EA	(6)					N/A	N/A
1829781		CROISSANT, ALL-BUTTER 3 OZ UNGLICED BAKED FROZEN ROLL		CHEFS LINE	6/8 EA	(7)					N/A	N/A
Bags												
1088582		BAG, FOOD STORAGE 12X14 UTILITY CLEAR PLASTIC ROLL		HANDGARD	1000 EA	(8)					N/A	N/A
7262306		BAG, FOOD STORAGE 6.5X7 PORTION THURSDAY BROWN PLASTIC		HANDGARD	10/200 EA	(9)					N/A	N/A
9477563		BAG, FOOD STORAGE 6X3 UTILITY TWIST CLEAR POLYETHYLENE SANDWICH ROLL 60 MI		HANDGARD	1000 EA	(10)					N/A	N/A
1188069		BAG, FOOD STORAGE 6.5X7 PORTION FRIDAY GREEN PLASTIC		HANDGARD	10/200 EA	(11)					N/A	N/A
2189088		BAG, FOOD STORAGE 6.5X7 PORTION SATURDAY ORANGE PLASTIC		HANDGARD	10/200 EA	(12)					N/A	N/A
6046403		BAG, FOOD STORAGE 19X24 FREEZER CLEAR PLASTIC		HANDGARD	250 EA	(13)					N/A	N/A
107672		BAG, FOOD STORAGE 5X315 UTILITY TWIST CLEAR PLASTIC 6 MI		HANDGARD	1000 EA	(14)					N/A	N/A

Step 4 - Record the inventory

Use the Inventory Worksheet to record the inventory

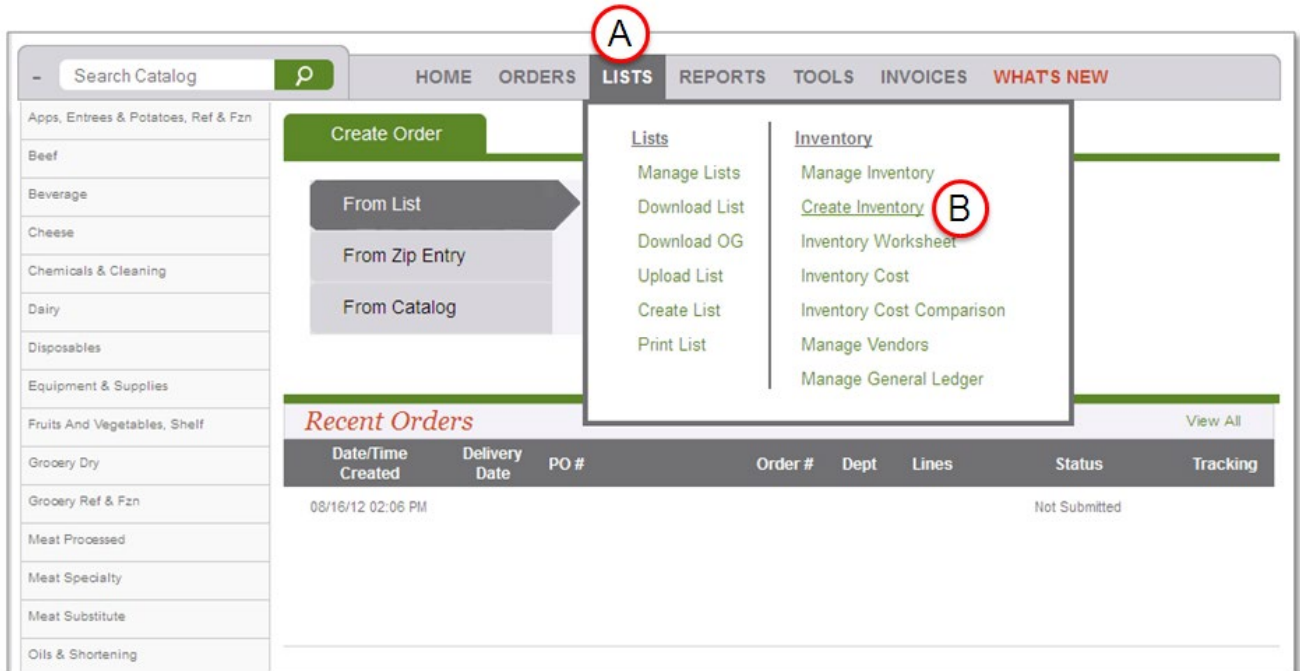


If you have a wifi signal and a tablet, record the inventory directly into the system.



Step 5 - Enter the recorded inventory online

- A. From the home page, click on **Lists**
- B. Click on **Create Inventory**



- C. If there is more than one customer number attached to the user ID, verify the correct customer and department is selected
- D. Select the Shopping List used to create the Inventory Worksheet
- E. Select the date of the inventory. Note: only one inventory per date per list can be entered
- F. Click **Create**

Create Inventory

Close X

Select the location and shopping list information from in the spaces provided below. Press the CREATE button to generate the new inventory.

Location:

TRAINING CUST-AU

C

Department:

NONE(0)

D

Shopping List:

Main Shopping List

E

List Creation Date:

08/01/2012

F

Create

- G. Once you click Create, the Manage Inventories page will appear
- H. Open the selected inventory by clicking on the double arrows

Manage Inventories

Create New Inventory

List Name	Create Date	Options
H >> Main Shopping List	08/02/2012	Options
>> Main Shopping List	08/01/2012	Options
>> Main Shopping List	07/31/2012	Options
>> Main Shopping List	07/30/2012	Options
>> Main Shopping List	07/29/2012	Options
>> Main Shopping List	07/03/2012	Options
>> Main Shopping List	06/28/2012	Options

- I. Before entering the inventory, scroll to the bottom of the screen and click on Get Price. The current USF pricing will be pulled into the inventory.
- J. Make needed adjustments to Non-USF products
- K. Enter full cases in the Case column
- L. Enter partials and catch weights in the Inv Unit column
- M. The system automatically saves your work so there is no Save button.
- N. Complete entering all inventory counts

Filter list by...

Main Shopping List 08/02/2012

Group: All Vendor: All


Group	Line	SC	Image	Description	Brand	Pack	Price	Case	Inv Unit	Full	Partial
Bakery	1			ROLL, BRIOCHE 4" ROUND SLICED TFF BAKED FROZEN BUN (8979734)	EURO-BAKE	4/25/3.04 OZ	46.80				
Bakery	2			Hamburger Buns (1000000002)	Butternut	12/24	10.00	2.00	3		
Bakery	3			BAG, FOOD STORAGE 8X3X15 PRODUCE TWIST CLEAR PLASTIC LOW DENSITY (4497392)	HANDGARDS	1000 EA	51.10	2.00	0.00		
Bakery	4			CINNAMON ROLL, ICED THAW & SERVE FROZEN TRAY PACK TFF (5840848)	HILLTOP HEARTH	36/2 OZ	24.75	2.00	0.00		
Bakery	5			CINNAMON ROLL, ICED BAKED FROZEN CUP (1792365)	PILLSBURY	60/2.63 OZ	69.30	2.00	0.00		
Bakery	6			BUN, 9 GRAIN SPROUTED 4" SLICED BAKED FROZEN ROLL (1829787)	CHEF'S LINE	6/8 EA	41.75	2.00	0.00		
Bakery	7			CROISSANT, ALL-BUTTER 3 OZ UNSLICED BAKED FROZEN ROLL BUN (1829761)	CHEF'S LINE	6/8 EA	53.45	1.00	0.00		

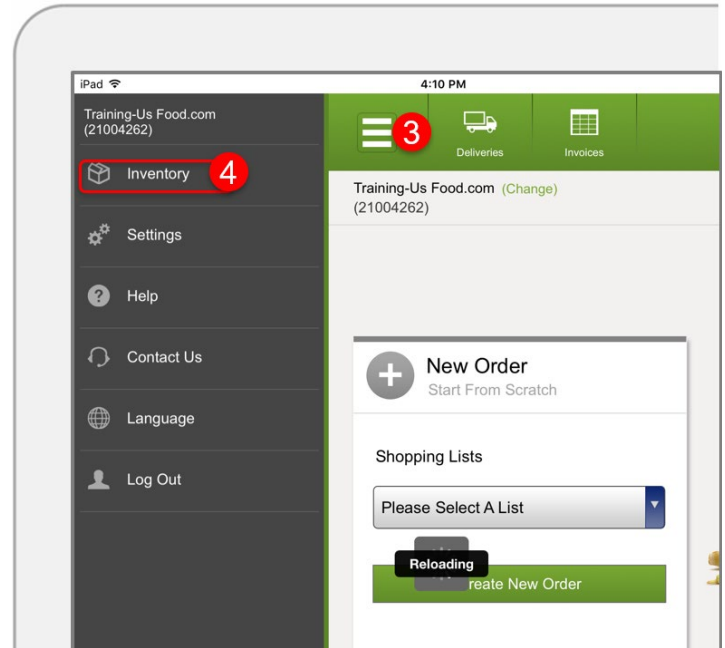
Create New Inventory **Get Price** Create Par Order **Review Order**

I

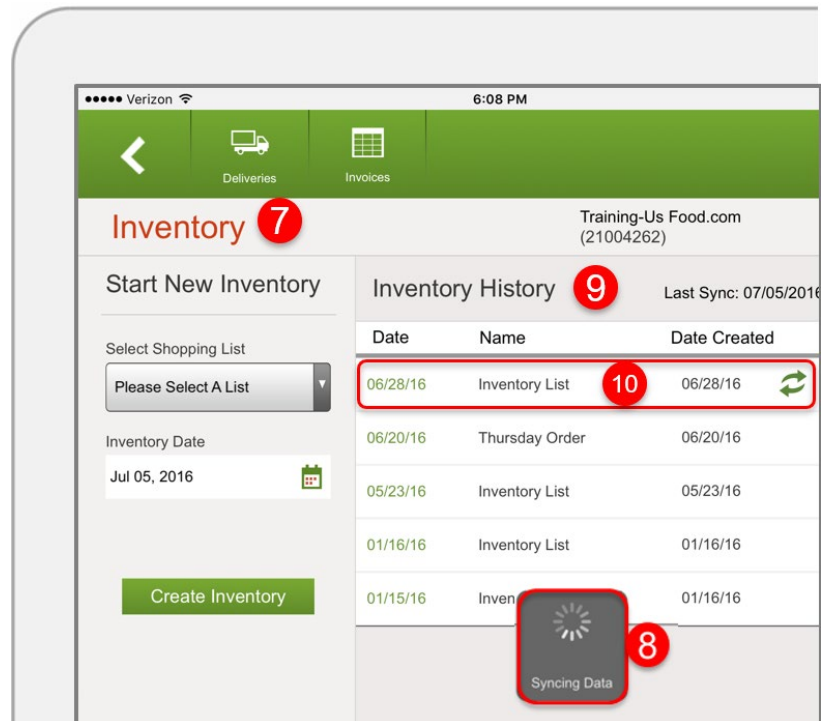
Note – If you don't enter your inventory values on the day you take the inventory, make sure to click "Get Price" price on the day you want to use for costing the inventory.

Step 6 – Record the inventory using the mobile app (Skip to step 9 if entering inventory online)

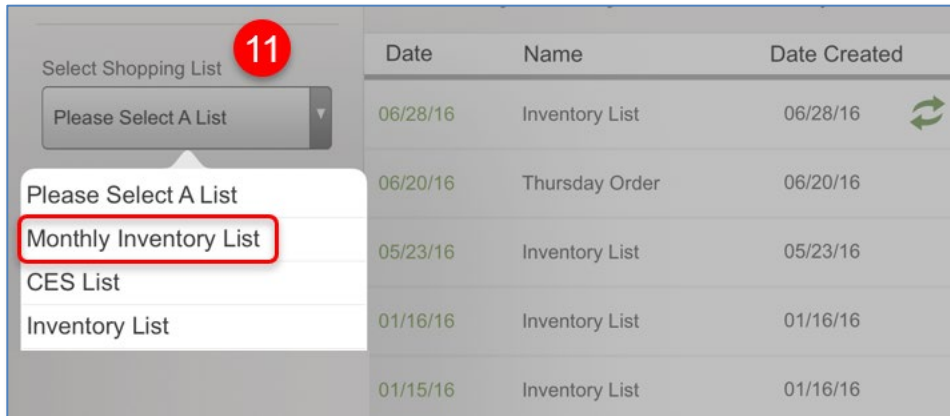
1. Sign on to the mobile app.
2. Verify the tablet has a wireless signal. The signal indicator  should have two or more bars
3. Click on the pancake menu icon.
4. Select Inventory from the exposed menu items.
5. If the user has a wifi or cellular signal, the synching / reloading message will appear.
6. If the user does not have a wifi or cellular signal, this message will not appear.



7. The Inventory page will appear.
8. If the user has a wifi connection, the synching message will appear in the middle of the screen.
9. All of the prior inventories will appear.
10. Users can select the last inventory created or create a new inventory.



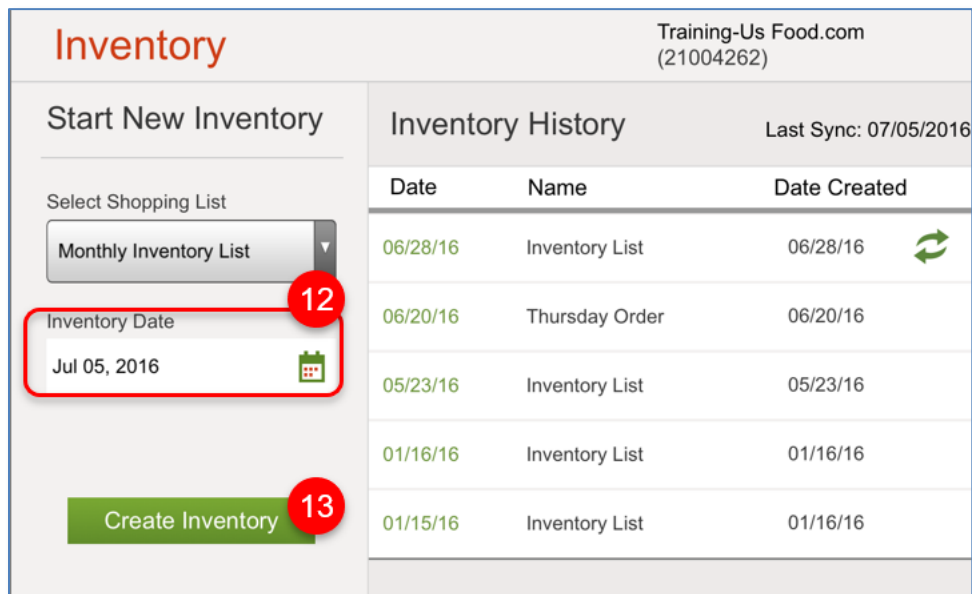
- To create a new inventory, tap on the "Select the Shopping List" drop down. Tap on the shopping list to be used to record the inventory.



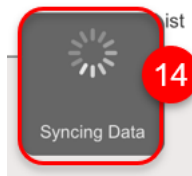
- The inventory date will default to the current date. Change if needed.

Note: only one inventory per date per list can be entered

- Tap on "Create Inventory".

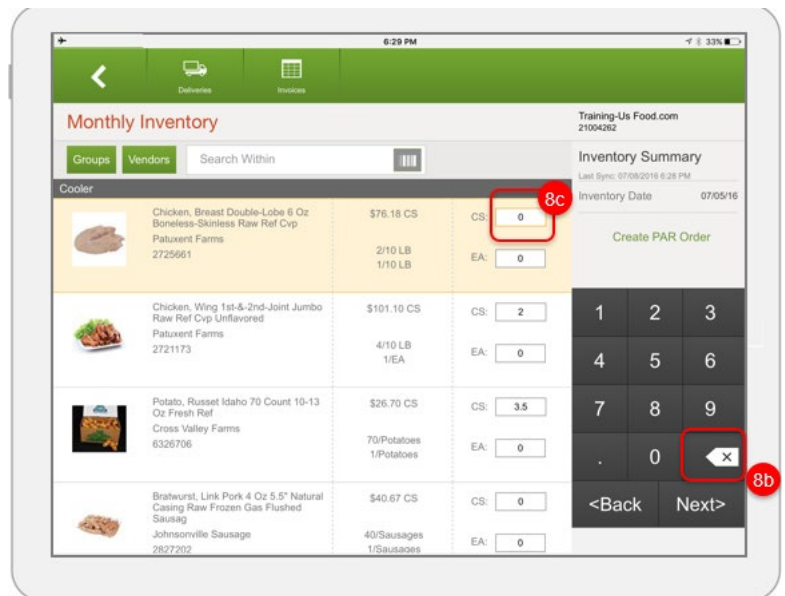
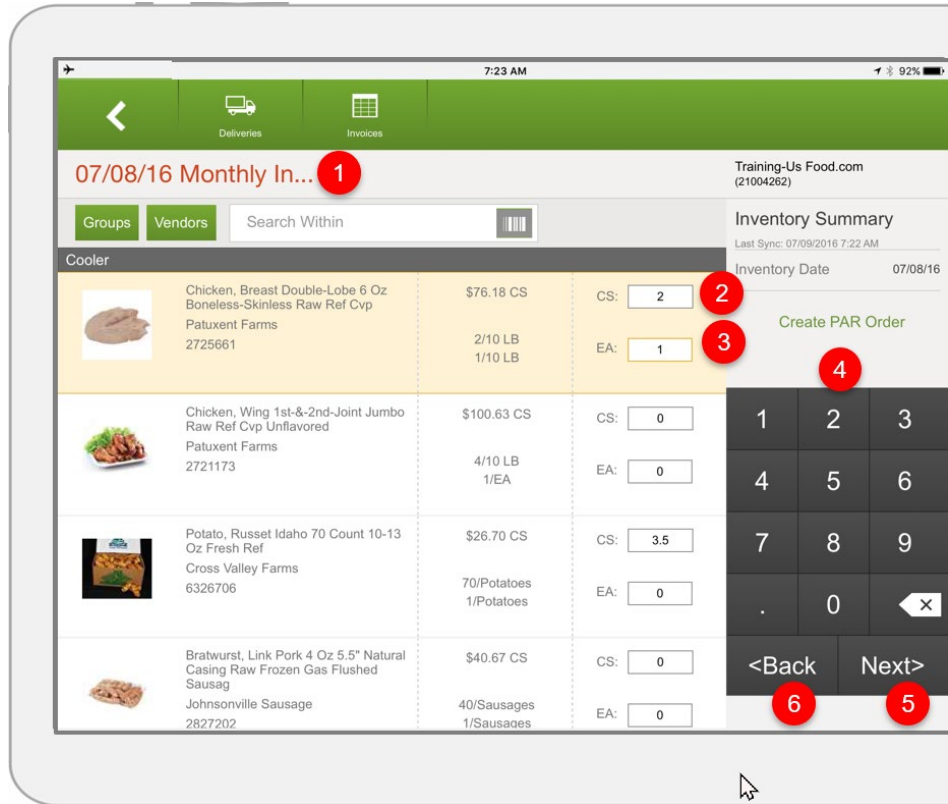


- The syncing message will appear as the list is downloaded to the tablet.



Step 7 – Enter the inventory on the mobile app

1. As soon as the list finishes downloading, it will appear on the tablet.
2. Tap the case field to enter full cases in the Case field. Each tap increases the count by one case.
3. Tap the EA field to enter partials, inventory units or catch weights. Each tap increases the count by one unit.
4. Use the keypad to enter quantities, decimal units or to delete a quantity.
5. Tap on Next button to move to the next field.
6. Tap on Back button to move to the prior field.
7. **Enter decimal numbers with the keypad**
 - a) Tap on the quantify field of the selected products.
 - b) Tap on the decimal point
 - c) Tap on the number from the keypad.
 - d) The decimal number will populate the field
8. **Delete a quantity**
 - a) Tap on the quantity
 - b) Tap **twice** on the delete key.
 - c) The quantity resets to zero
9. When all products quantities have been entered, you are now ready to synch the inventory.
10. Synching the inventory will post the inventory counts to US Foods Online.



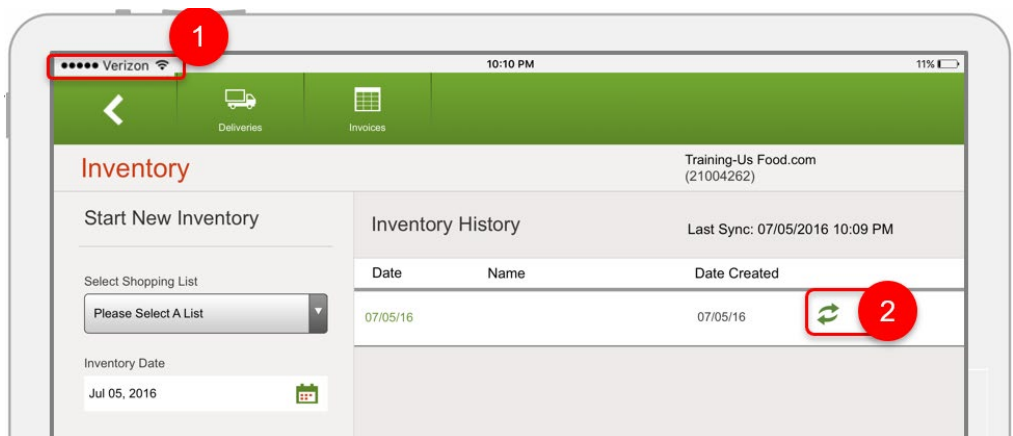
Step 8 – Synch the mobile app

If you had a **wireless signal** while entering the inventory, the inventory was synching each time you moved to the next page.

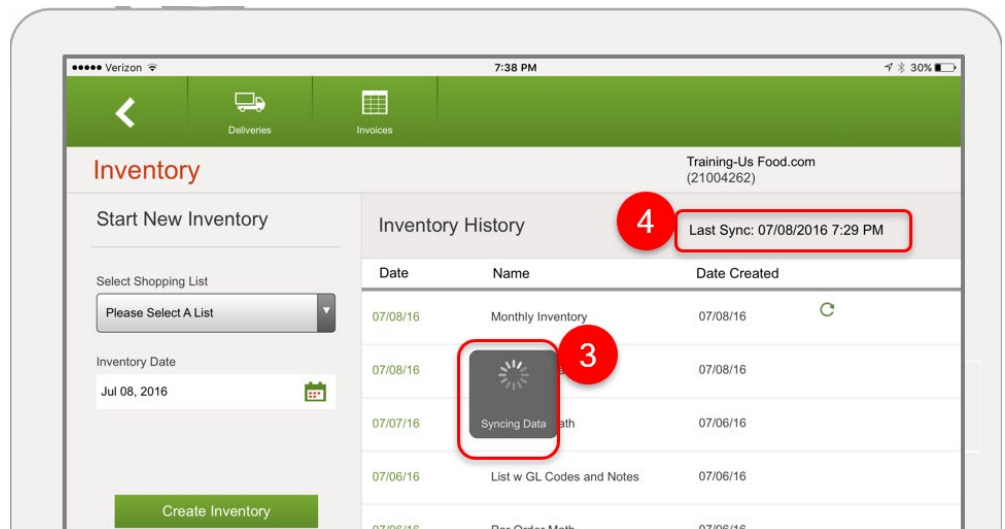
If you did not have a **wireless signal** while entering the inventory, you will need to synch. You'll know that you do not have a wireless signal if

- a) there is no signal indicator OR
- b) there are no pictures on the inventory list OR
- c) You turned it off manually by putting the ipad in airplane mode

1. Verify the tablet has a wireless signal. The signal indicator should have two or more bars
2. Once the signal is restored, tap on the inventory synch icon to start the synching process.

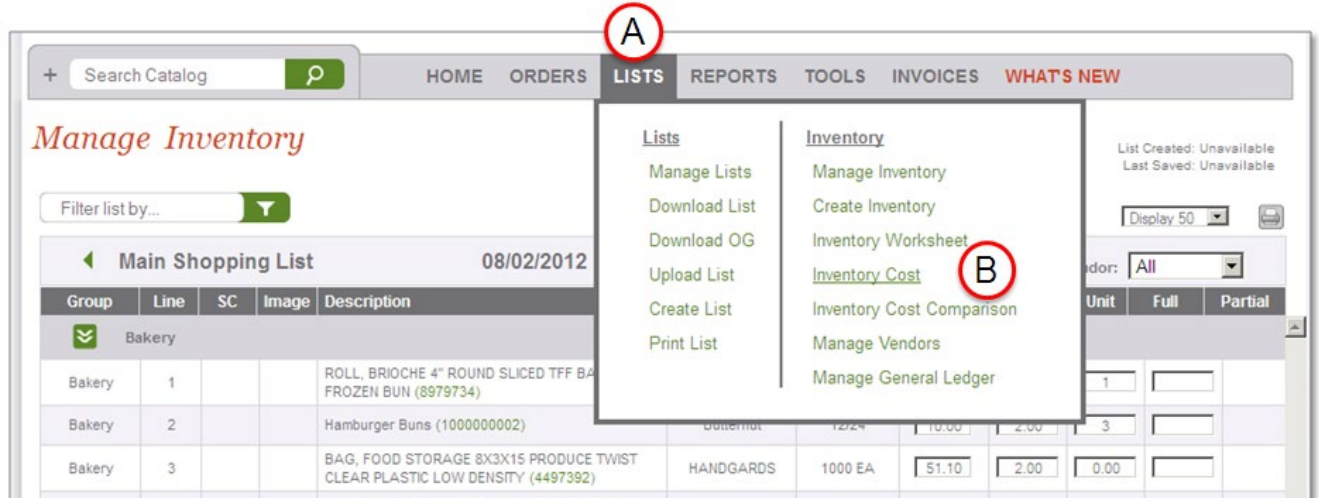


3. The synching message will display along with all of the exiting inventories.
4. The last synch date will also update



Step 9 - Print the Inventory Cost Report


- A. Click on **Lists**
- B. Click on **Inventory Cost**.



- C. Select the date
- D. Select the inventory name or print all inventories recorded on the selected date
- E. Choose the **Report Format**:
- F. PDF or
- G. Excel
- H. Choose the desired **Sort By** option
- I. Click on **Create Report**



Sample Printed Inventory Cost Report



Inventory Cost - 08/02/2012

Customer: TRAINING CUST-AUSTIN (83941906)

Division: AUSTIN (3023)

Product	Status	Description	Brand	Pack Size	UOM	Units/Full	Full	Part	Cost	Extended
Main Shopping List										
4497392		BAG, FOOD STORAGE 6X3X15 PRODUCE TWIST CLEAR PLASTIC LOW DENSITY	HANDGARDS	1000 EA	CS	2/CS	2.00	0.00	\$51.10	\$102.20
1829787		BUN, 9 GRAIN SPROUTED 4" SLICED BAKED FROZEN ROLL	CHEFS LINE	6/8 EA	CS	1/CS	2.00	0.00	\$41.75	\$83.50
1792365		CINNAMON ROLL, ICED BAKED FROZEN CUP	PILLSBURY	60/2.63 OZ	CS	1/CS	2.00	0.00	\$69.30	\$138.60
5840848		CINNAMON ROLL, ICED THAW & SERVE FROZEN TRAY PACK TFF	HILLTOP HEARTH	36/2 OZ	CS	1/CS	2.00	0.00	\$24.75	\$49.50
1829761		CROISSANT, ALL-BUTTER 3 OZ UNSLICED BAKED FROZEN ROLL BUN	CHEFS LINE	6/8 EA	CS	1/CS	1.00	0.00	\$53.45	\$53.45
100000000		Hamburger Buns	Buttermilk	12/24	CS	1/CS	2.00	3.00	\$10.00	\$50.00
8979734		ROLL, BRIOCHE 4" ROUND SLICED TFF BAKED FROZEN BUN	EURO-BAKE	4/25/3.04 OZ	CS	1/CS	1.00	1.00	\$46.80	\$93.60
List Total: Main Shopping List										\$570.85
Grand Total: TRAINING CUST-AUSTIN (83941906)										\$570.85

Step 10 - Print the Inventory Cost Comparison Report

- A. Click on **Lists**
- B. Click on **Inventory Cost Comparison**.

Manage Inventory

Filter list by...

Main Shopping List 08/02/2012

Group	Line	SC	Image	Description	Unit	Full	Partial
Bakery	1			ROLL, BRIOCHE 4" ROUND SLICED TFF BAKED FROZEN BUN (8979734)			
Bakery	2			Hamburger Buns (1000000002)			
Bakery	3			BAG, FOOD STORAGE 8X3X15 PRODUCE TWIST CLEAR PLASTIC LOW DENSITY (4497392)	HANDGARDS	1000 EA	\$1.10 2.00 0.00
Bakery	4			CINNAMON ROLL, ICED THAW & SERVE FROZEN TRAY PACK TFF (5840848)	HILLTOP HEARTH	36/2 OZ	\$4.75 2.00 0.00

- C. Select the Inventory to compare
- D. Select the dates to compare
- E. Choose the **Report Format**:
- F. PDF or
- G. Excel
- H. Choose the products to include
- I. Choose the sort option
- J. Click on **Create Report**

Inventory Cost Comparison Report Close X

Select from the report parameters listed below. Press CREATE REPORT to begin report generation.

Select Inventory: **Main Shopping List** C

Dates To Compare: 08/01/2012 and 08/01/2012 D

Report Format: **PDF Report (Adobe Acrobat)** E

Include: ☒ All Products F
☐ Changed Products

Sort By: ☒ Line Number (Ascending) G
☐ Percent Price Change (Descending)

Create Report H

Sample Inventory Cost Comparison Report

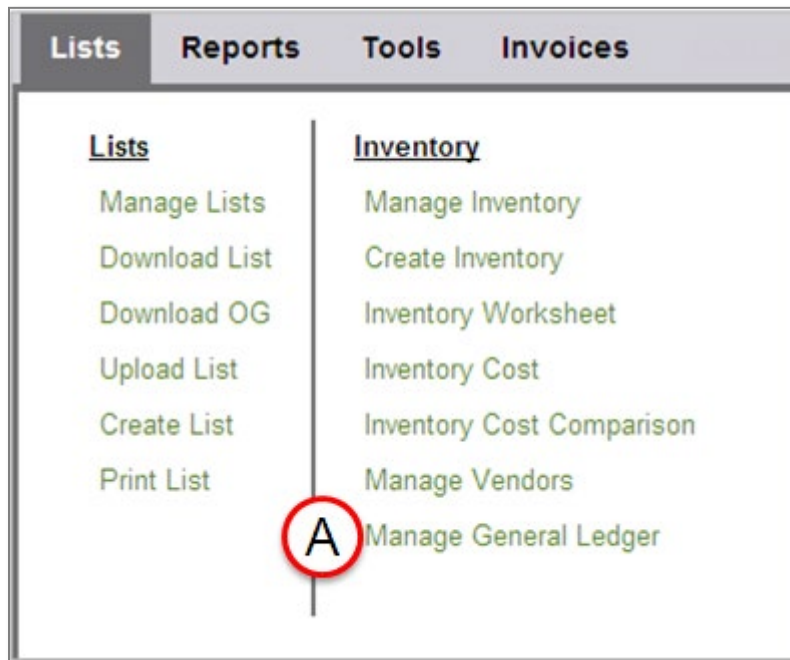
<div>  Inventory Cost Comparison Customer: TRAINING CUST-AUSTIN (83941906) Division: AUSTIN (3023) </div>											
Product	Status Description	Brand	Pack Size	Vendor	Units	08/02/2012		08/01/2012		\$ Chg	% Chg
8979734	ROLL, BRIOCHE 4" ROUND SLICED TFF BAKED FROZEN BUN	EURO-BAKE	4/25/3.04 OZ	USF	1/CS	\$46.80	\$46.80	\$0.00	\$0.00	\$46.80	100%
1086582	BAG, FOOD STORAGE 10X14 UTILITY CLEAR PLASTIC ROLL	HANDGARDS	1000 EA	USF	1/CS	\$70.75	\$70.75	\$0.00	\$0.00	\$70.75	100%
4489407	CEREAL, ASSORTED SS BOX SHELF STABLE FAMILY PACK	KELLOGGS	72/1 OZ	USF	1/CS	\$52.00	\$52.00	\$0.00	\$0.00	\$52.00	100%
7262306	BAG, FOOD STORAGE 6.5X7 PORTION THURSDAY BROWN PLASTIC	HANDGARDS	10/200 EA	USF	10/CS	\$70.65	\$7.07	\$0.00	\$0.00	\$70.65	100%
1024512	CEREAL, CORN FLAKE COUNTRY SS	GENERAL MILLS	96/687 OZ	USF	1/CS	\$48.35	\$48.35	\$0.00	\$0.00	\$48.35	100%
1120971	CEREAL, CAPTAIN CRUNCH BULK	CAPN CRUNCH	4/2.125 LB	USF	4/CS	\$42.15	\$10.54	\$0.00	\$0.00	\$42.15	100%
9477563	BAG, FOOD STORAGE 6X8 UTILITY TWIST CLEAR POLYETHYLENE SANDWICH ROLL .60 MI	HANDGARDS	1000 EA	USF	1/CS	\$38.95	\$38.95	\$0.00	\$0.00	\$38.95	100%
1000000002	Hamburger Buns	Buttermilk	12/24	001	1/CS	\$10.00	\$10.00	\$10.00	\$10.00	\$0.00	0%
7520356	CEREAL, OATMEAL INSTANT SS POUCH	HILLTOP HEARTH	12/12 EA	USF	48/CS	\$40.95	\$0.85	\$0.00	\$0.00	\$40.95	100%
1188069	BAG, FOOD STORAGE 6.5X7 PORTION FRIDAY GREEN PLASTIC	HANDGARDS	10/200 EA	USF	10/CS	\$70.65	\$7.07	\$0.00	\$0.00	\$70.65	100%
2188068	BAG, FOOD STORAGE 6.5X7 PORTION SATURDAY ORANGE PLASTIC	HANDGARDS	10/200 EA	USF	10/CS	\$70.65	\$7.07	\$0.00	\$0.00	\$70.65	100%

Appendix

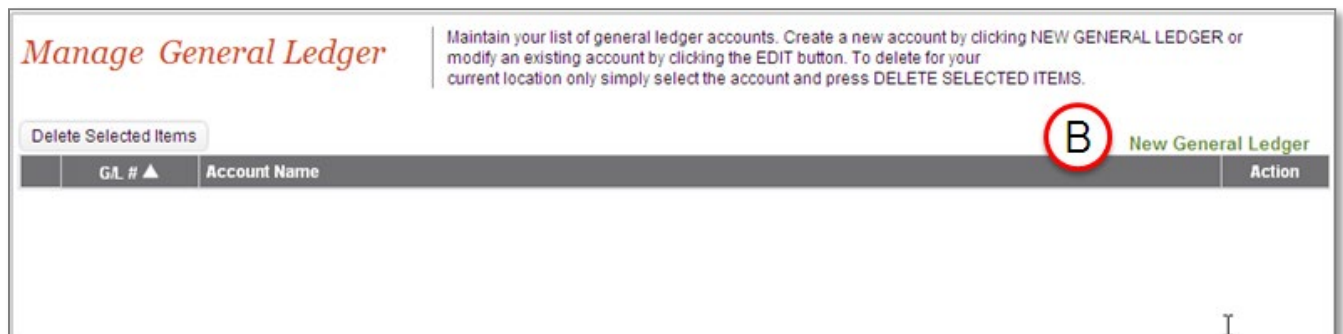
Inventory Pre-work

Step 1: Pre-work - Create GL Codes (optional)

C. From the Lists menu, click on Manage General Ledger.



D. Click on the New General Ledger link.



- F. Enter the GL # and Account Name.
- G. Click on Save to Current Location Only.
- H. Choose Save to All Locations if you want all assign the new GL codes to all customer numbers attached to your user ID.

- F. Select Yes to confirm and continue.

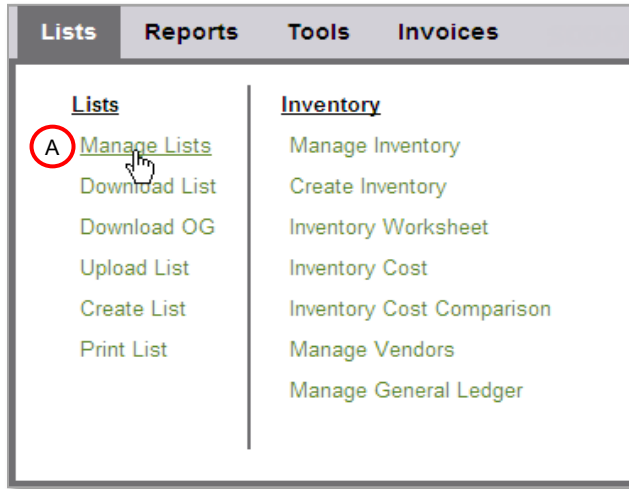
Repeat process until all GL Codes and Account Names have been entered.

Delete Selected Items		New General Ledger	
	GL # ▲	Account Name	Action
<input type="checkbox"/>	10Meat	Meats	Edit
<input type="checkbox"/>	15Prdc	Produce	Edit
<input type="checkbox"/>	20Groc	Groceries	Edit
<input type="checkbox"/>	30Chem	Chemicals and Cleaning	Edit
<input type="checkbox"/>	40Papr	Paper	Edit
<input type="checkbox"/>	50Eqmt	Equipment	Edit

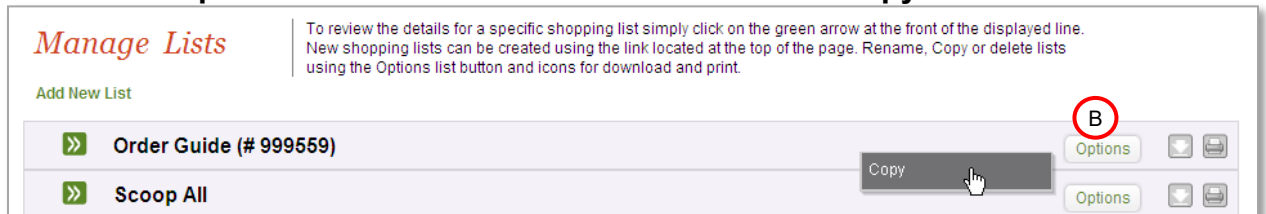
Step 2: Pre-work - Copy a new list to record inventory

The easiest way to create a list to be used for inventory is to copy your order guide.

- A. From the Lists menu, click on **Manage Lists**.



- B. Click on the **Options** button on the Order Guide and select **Copy**.



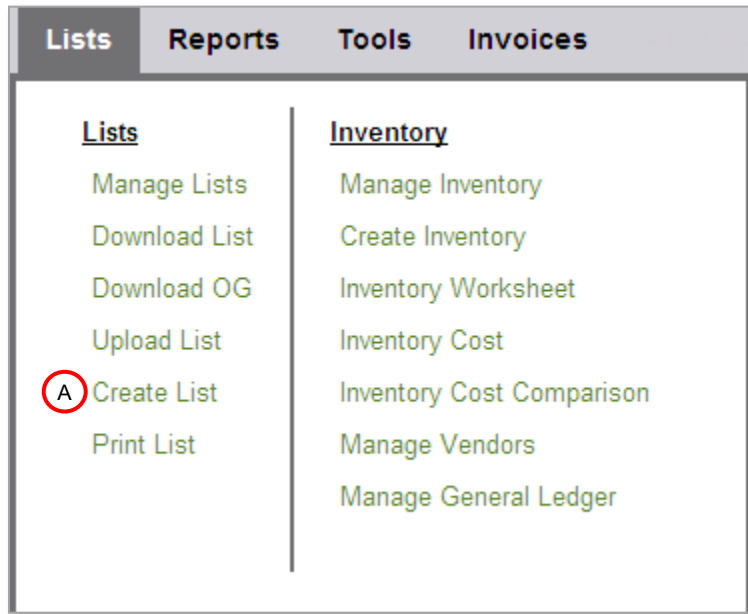
- C. Enter a name for the list.

- D. Click on **Copy**.

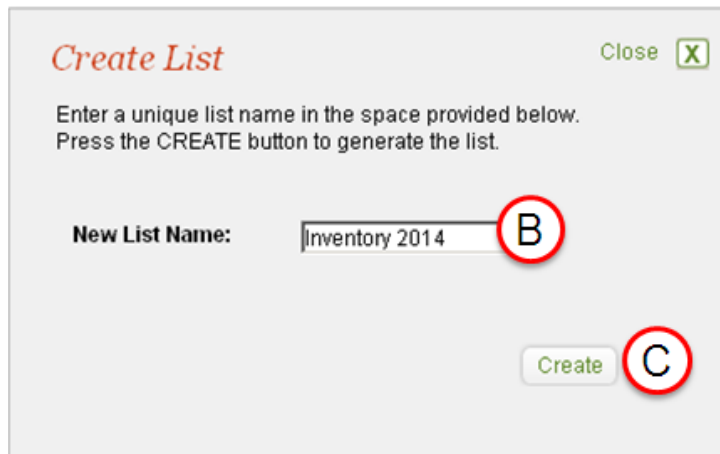
Create a new list from scratch to record inventory

You can create a list from scratch by entering the needed product numbers.

- A. From the Lists menu, click on **Create List**.



- B. Enter the name of the new list.
- C. Click on **Create**.



The screenshot shows a 'Create List' form. At the top right, there is a 'Close' button with an 'X' icon. Below the title, there is a text box with the instruction: 'Enter a unique list name in the space provided below. Press the CREATE button to generate the list.' Below this, there is a label 'New List Name:' followed by a text input field containing 'Inventory 2014'. The input field is circled in red with a red 'B' next to it. Below the input field, there is a 'Create' button, which is circled in red with a red 'C' next to it.

Add groups to the list

- A. Click on **Edit List**.

The screenshot shows the 'Manage List' interface. At the top, there's a 'Filter list by...' dropdown and a 'Display All' button. Below that, the 'Inventory 2014' section has a 'View Group' dropdown set to 'All', a 'Show Default Quantities' link, and an 'Edit List' button circled in red with a red 'A'. Below this is a table with columns: Sel, Group, Line, SC, Image, Description, Brand, Pack, Price, Ref #. The table shows a 'Default Group' with '(0 Products)'. An 'Add to:' dropdown is set to 'Default Group'. An 'Edit Group' button is at the bottom right.

- B. Select **New Group**.

The screenshot shows the 'Inventory 2014' interface. A context menu is open over the 'Default Group' row, showing options: Rename, Copy, New Group (circled in red with a red 'B'), Expand All Groups, Collapse All Groups, and Add Replacements. The 'Edit List' button is visible in the top right.

- C. Enter name of new group.

- D. Click on **Create Group**.

The screenshot shows the 'New Shopping Group' dialog box. It has a 'Close' button with an 'X' icon. The 'New Group Name:' label is followed by a text input field containing 'Groceries', which is circled in red with a red 'C'. At the bottom right, there is a 'Create Group' button circled in red with a red 'D'.

- E. Repeat process until all groups are entered.

- F. To add products to the groups click on **Edit Group**

- G. Select **Add Products**.

Add products to the group

- A. To add products to the groups click on **Edit Group**.
- B. Select **Add Products**.

The screenshot shows the 'Inventory 2014' interface. At the top, there's a 'View Group' dropdown set to 'All' and a 'Show Default Quantities' button. Below this is a table with columns: Sel, Group, Line, SC, Image, Description, Brand, Pack, Price, Ref #. The table lists three groups: Groceries (0 Products), Frozen (0 Products), and Refrigerated (0 Products). A context menu is open for the 'Groceries' group, showing options: Rename, Copy, Move, Delete, Add Products (highlighted with a red circle 'B'), and Add Non-Usfood Product. The 'Edit Group' button is highlighted with a red circle 'A'.

- C. Enter product numbers. Product description will appear after enter key is pressed.
- D. After the first 5 products are entered the screen will open a new field.
- E. Click on **Add** or **Add Products** to add products to the group and close the window.

The screenshot shows the 'Manage List' interface. At the top, there's a 'Filter list by...' dropdown and a 'Display All' button. Below this is a table with columns: Sel, Group, Line, SC, Image, Description. The table lists three groups: Groceries (0 Products), Frozen (0 Products), and Refrigerated (0 Products). A dialog box titled 'Add Products' is open, showing a list of product numbers and descriptions. The 'Add' button is highlighted with a red circle 'E'. The 'Add Products' button is highlighted with a red circle 'E'. The 'Enter Product Numbers below:' field is highlighted with a red circle 'C'. The 'Add' button is highlighted with a red circle 'D'.

Step 3: Pre-work - Assign GL Codes (optional)

Make sure GL codes have been setup prior to this step (see page 31).

- Select products to assign GL code to.
- Click on **Assign To Selected**.
- Select the desired GL code from the drop down.
- Click on **Apply Changes**.

Manage List

Filter list by... Assign To Selected Delete Selected

Inventory 2014 View Group: All Show Default Quantities Edit List

Add To List: Product Number Ref Number Description.. Add to: Groceries

Sel	Group	Line	SC	Image	Description	Brand	Pack	Price	Ref #
<input checked="" type="checkbox"/>	Groceries	1			COBELER, CHERRY RAW FOIL PAN FROZEN (4571683)	HILLTOP HEARTH	4/5 LB	\$58.81 CS	
<input checked="" type="checkbox"/>	Groceries	2			COBELER, APPLE RAW FOIL PAN FROZEN (996728)	HILLTOP HEARTH	4/5 LB	\$44.28 CS	
<input checked="" type="checkbox"/>	Groceries	3			DRINK BASE, LEMONADE 5:1 LIGHT BAG-IN-BOX SHELF STABLE (1400571)	MINUTE MAID	5 GA	\$103.84 CS	
<input checked="" type="checkbox"/>	Groceries	4			DRINK MIX, LEMONADE 2 GAL YIELD POWDER POUCH (1328038)	THRISTERMONARCH	12/24		
<input checked="" type="checkbox"/>	Groceries	5			COOKIE, VANILLA WAFER (5274998)	KEEBLER	6/13.3		

With Selected: Close

Assign Vendor: Select Vendor...

Assign General Ledger: **Groceries**

Move to Group: Select Group...

Apply Changes

Step 4: Pre-work - Edit inventory units (optional)

All products are pre-populated with CS as the Inventory Unit Description and many products have the number of Inventory Units per Full Case preset. These values should be verified and can be edited to support the way you count inventory.

- A. To access the Inventory tab for the product you are working with, open the list that will be used for recording the inventory and click on the product number.

Sel	Group	Line	SC	Image	Description	Brand	Pack	Price	Ref #
<input type="checkbox"/>	FROZEN FOOD	7			COBBLER, CHERRY RAW FOIL PAN FROZEN (4571683)	HILLTOP HEARTH	4/5 LB	\$58.81 CS	<input type="text"/>
<input type="checkbox"/>	FROZEN FOOD	8			COBBLER, APPLE RAW FOIL PAN FROZEN (996728)	HILLTOP HEARTH	4/5 LB	\$44.11 CS	<input type="text"/>
<input type="checkbox"/>	FROZEN FOOD	9			COBBLER, PEACH RAW FOIL PAN FROZEN ARTIFICIALLY FLAVORED (4571600)	HILLTOP HEARTH	4/5 LB	\$50.36 CS	<input type="text"/>
<input type="checkbox"/>	FROZEN FOOD	10			PIE, CHOCOLATE CREAM 10" THAW & SERVE FROZEN (4578423)	HILLTOP HEARTH	6/27 OZ	\$42.67 CS	<input type="text"/>

- B. Enter the new values.
- C. Use the scroll bar to move to the bottom of the inventory tab.
- D. Click on **Save**.
- E. Move to the top of the Product Detail screen and click on **Close**.

Inventory (10 Products)

Group: FROZEN FOOD
Reference: US Foods
Vendor: US Foods
General Ledger: Groceries

Inv. Unit Desc: Pies
Inv. Units / Full: 6
Inventory Price: 42.67 per CS

Par Stock Quantities
Quantities should be placed in the space(s) next to the day(s) you place your order.

Sun: 1 Mon: 1 Tue: 1 Wed: 2 Thu: 2 Fri: 2 Sat: 3

Product Detail
PIE, CHOCOLATE CREAM 10" THAW & SERVE FROZEN
Product Number: 4578423
Brand Name: HILLTOP HEARTH

Step 5: Pre-work - Create vendors for non-USF products (optional)

- From the Lists menu, click on **Manage Vendors**.
- Enter the vendor information. (required information is noted by the red asterisk.)

The screenshot shows the 'Lists' menu with 'Manage Vendors' highlighted by a red circle labeled 'A'. To the right, the 'Add/Edit Vendor Details' form is displayed. The form title is 'Add/Edit Vendor Details' with a 'Close' button. Below the title is a note: 'Maintain existing Vendor information. Modify the Vendor information below and press SAVE to update for your current location only or to update across all locations use SAVE ALL.' The form contains several fields: 'Code' (with value 1234), 'Name' (with value Icelandic), 'Address 1', 'Address 2', 'City', 'State' (dropdown menu showing Alaska), 'Phone', 'Email', 'Terms', and 'Comments'. A red circle labeled 'B' is placed over the 'Code' field.

- Use the scroll bar to move to the bottom of the Vendor setup page.
- Click on **Save to Current Location Only**.
- Choose **Save to All Locations** if you want all assign the new Vendor to all customer numbers attached to your user ID.
- Select **Yes** to confirm and continue.

The screenshot shows the bottom of the 'Add/Edit Vendor Details' form. The 'State' dropdown menu is set to 'Alaska'. The 'Comments' field is empty. The 'Zip Code' field is empty. At the bottom, there are two buttons: 'Save to Current Location Only' (highlighted by a red circle labeled 'D') and 'Save to All Locations' (highlighted by a red circle labeled 'E'). To the right, a confirmation dialog box is shown with the text 'Are you sure you want to save to your current location only?' and two buttons: 'Yes' (highlighted by a red circle labeled 'F') and 'Cancel'.

Step 6: Pre-work - Create non-USF products (optional)

- A. From the Lists menu, click on **Manage Lists**.
- B. Click on **Edit Group**.
- C. Click on **Add Non-US Food Product**

Lists **Reports** **Tools** **Invoices**

Lists

- Manage Lists (A)
- Download List
- Download OG
- Upload List
- Create List
- Print List

Inventory

- Manage Inventory
- Create Inventory
- Inventory Worksheet
- Inventory Cost
- Inventory Cost Comparison
- Manage Vendors
- Manage General Ledger

Inventory 2014 View Group: All Show Default Quantities Edit List

Add To List: Product Number Ref Number Description... Add to: Groceries

Sel	Group	Line	SC	Image	Description	Brand	Pack	Price	Ref #
<input checked="" type="checkbox"/>	Groceries	(0 Products)							
<input checked="" type="checkbox"/>	Frozen	(0 Products)							
<input checked="" type="checkbox"/>	Refridgerated	(0 Products)							

Context Menu:

- Edit Group (B)
- Rename
- Copy
- Move
- Delete
- Add Products
- Add Non-US Food Product (C)

- D. The new non-US Foods product will appear at the bottom of the group.
- E. Click on the product number to add details.

Manage List

Filter list by... Display All

Inventory 2014 View Group: PROTEIN Show Default Quantities Edit List

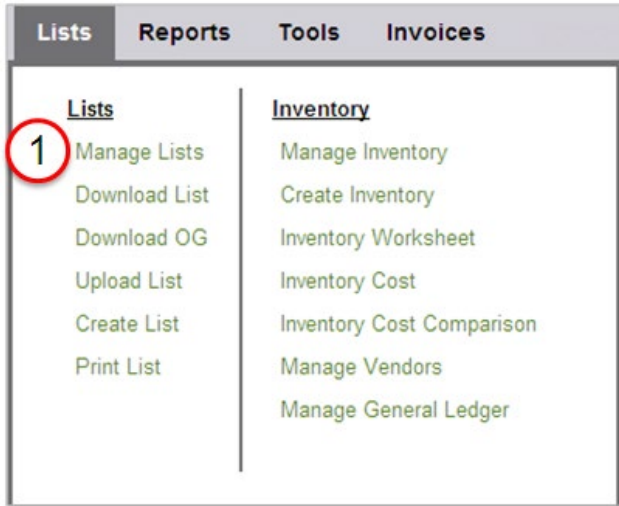
Add To List: Product Number Ref Number Description... Add to: PROTEIN

Sel	Group	Line	SC	Image	Description	Brand	Pack	Price	Ref #
<input checked="" type="checkbox"/>	PROTEIN	(7 Products)							
<input type="checkbox"/>	PROTEIN	1			BEEF, BRISKET FULL SELECT 120 DECKLE OFF RAW REF (ALT # 100600) (3710274)	IBP-IOWA BEEF PROCESSORS	5/14 LBA	\$3.48 LB	<input type="text"/>
<input type="checkbox"/>	PROTEIN	2			CHICKEN, NUGGET DINOSAUR SHAPED .66 OZ BREADED BREAST MEAT CHILD-NUTRITION (ALT # 101100) (4101101)	TYSON	10.31 LB	\$34.20 CS	<input type="text"/>
<input type="checkbox"/>	PROTEIN	3			PORK, RIB ST. LOUIS STYLE 2.75 LB DOWN RAW FROZEN (ALT # 100800) (313569)	MAPLE LEAF MEAT	36 LBA	\$3.22 LB	<input type="text"/>
<input type="checkbox"/>	PROTEIN	4			BEEF SUB, PATTY MEATLESS VEGETABLE 3 GRAIN COOKED FROZEN VEGGIE BURGER 4.25 (1792399) Scoop	CHEF'S LINE	36/4.25 OZ	\$59.24 CS	<input type="text"/>
<input type="checkbox"/>	PROTEIN	5			BEEF, PATTY GROUND STEAK BURGER 4 OZ PUB COOKED FROZEN (4383055)	CATTLEMAN'S SELECTION	40/4 OZ	\$62.73 CS	<input type="text"/>
<input type="checkbox"/>	PROTEIN	6			BEEF SUB, PATTY MEATLESS BURGER BLACK BEAN SPICY COOKED FROZEN VEGETABLE (9164641)	MORNINGSTAR FARMS	4/12/3.3 OZ	\$71.10 CS	<input type="text"/>
<input type="checkbox"/>	PROTEIN	7 (D)			NON USF PROD 1000000013 (1000000013) (E)	NONE	NONE	No Price	<input type="text"/>

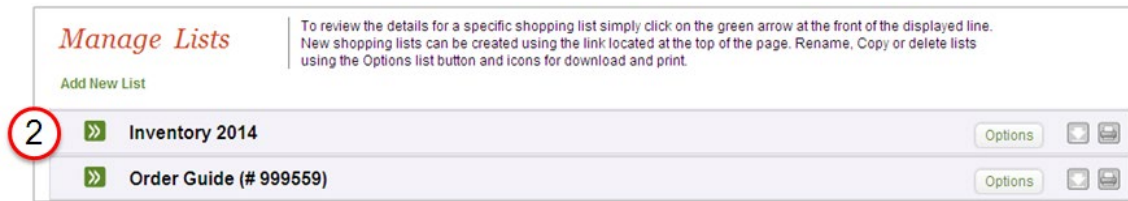
Add Products to a List

Add new products by using Search

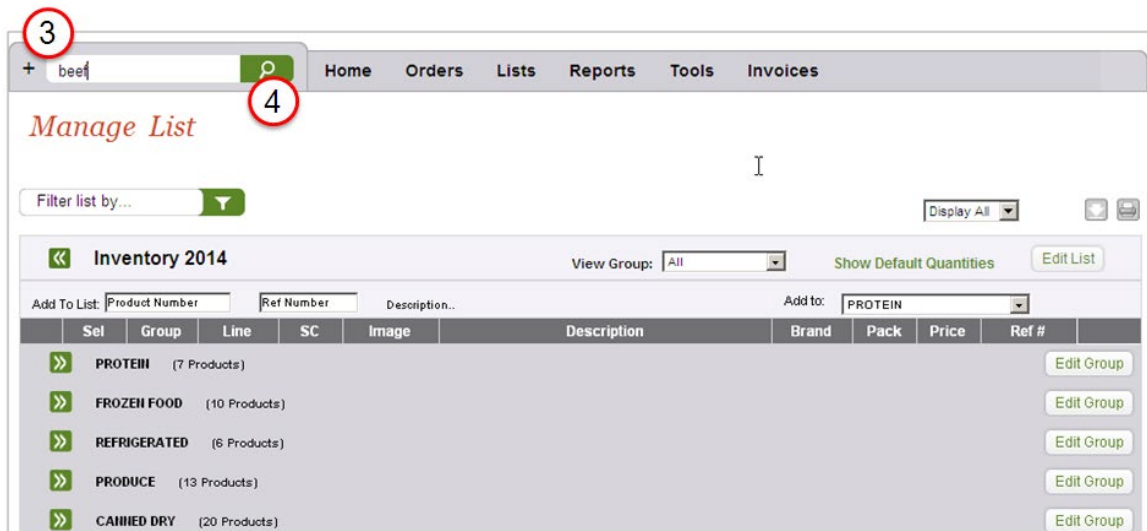
1. From the Lists menu, click on **Manage Lists**.



2. Click on the double green arrows to open the list.



3. Enter the search criteria in the search field.
4. Click the magnifying glass or press **Enter**.



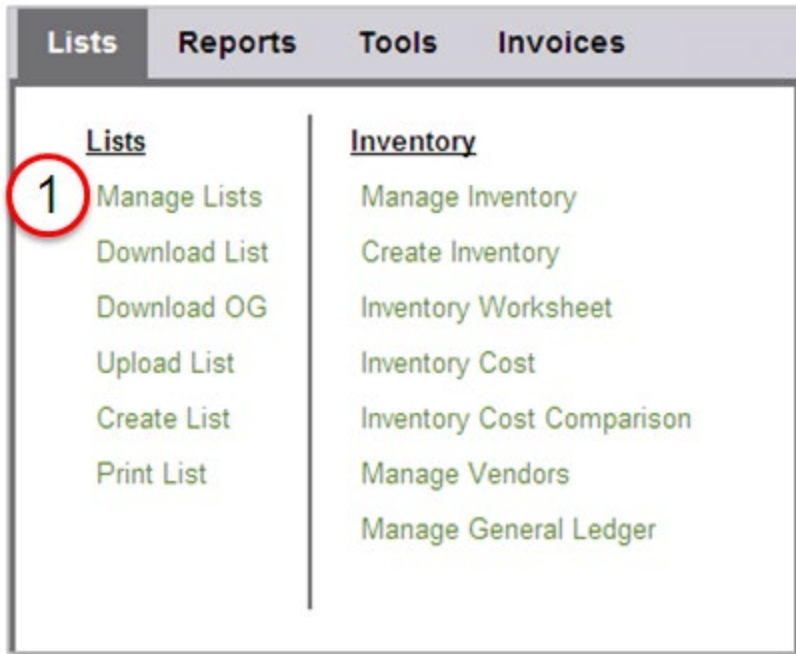
5. Click on **Filter Results By**
6. Select **Recently Purchased**
7. Select products to add to list
8. Select the **List Group**
9. Click on **Add Items to List**

The screenshot shows the 'Search Catalog' interface. On the left, the 'Filter Results By' section is expanded, and 'Recently Purchased' is selected. A red box highlights the 'Add to List' column in the product table. At the bottom, the 'List Group' is set to 'PROTEIN', and the 'Add Items To List' button is visible.

SC	OG	Image	Description	Brand	Pack	Price
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		BEEF, FLANK STEAK CHOICE 193 RAW REF (ALT # 65140) (5413695)	STOCK YARDS	10 LBA	\$4.74 LB
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		BEEF, STRIP LOIN CAB 180 0X1 BONELESS RAW REF (ALT # 65140) (9444514)	STOCK YARDS	12 LBA	\$6.32 LB
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		CORNE BEEF, BOTTOM ROUND DELI FACED FLAT SELECT COOKED REF 2-DIAMOND UNSLI (ALT # 65140) (4372371)	PATUXENT FARMS	2/5-7 LBA	\$4.14 LB
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		HOT DOG, ALL-BEEF 8:1 6" ROLLER GRILL COOKED FROZEN (ALT # 65140) (7330095)	PATUXENT FARMS	10 LB	\$25.40 CS
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		ROAST BEEF, TOP INSIDE ROUND CAP-OFF DELI-FACED COOKED MEDIUM RARE SELECT 10% INJECTED RUBBED REF 2-DIAMOND UNSLICED (ALT # 65140) (7336605)	PATUXENT FARMS	2/5-9 LBA	\$4.40 LB
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		BEEF, DICED STEW MEAT 75X.75 135A RAW FROZEN (ALT # 65140) (9489751)	ADVANCE FOOD HEARTLAND BEEF	2/5 LB	\$46.22 CS
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		BEEF, GROUND 80/20 FINE RAW REF CHUB (ALT # 65140) (9003864)	IBP-IOWA BEEF PROCESSORS	8/10 LBA	\$3.40 LB
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		BEEF, PATTY GROUND 100% PURE 80/20 4:1 ROUND RAW FROZEN (ALT # 65140) (8124158)	ROCHESTER MEATS	60/4 OZ	\$40.08 CS
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		BEEF, PATTY GROUND 78/22 3:1 DAISY SEASONED RAW FROZEN (ALT # 65140) (237887)	STRATOS	46/5.33 OZ	\$36.75 CS
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		BEEF, PATTY GROUND CHUCK 78/22 CAB 4:1 HOMESTYLE RAW FROZEN CLOUD (ALT # 65140) (5533567)	THE CERTIFIED CLOUD	60/4 OZ	\$49.15 CS
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		BEEF, TACO COOKED GROUND SEASONED SHELF STABLE (ALT # 65120) (703660)	HOME TASTE	6/48 OZ	\$69.73 CS
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		BEEF, TACO MEAT COOKED FROZEN W/ CHICKEN (ALT # 65120) (7415060)	TYSON	4/5 LB	\$38.84 CS
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		CORN DOG, ALL-BEEF CHILD-NUTRITION COOKED FROZEN W/ STICK (ALT # 65140) (8157638)	STATE FAIR	48/4 OZ	\$31.18 CS
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		CORN DOG, TURKEY MINI FROZEN (ALT # 65140) (8157638)	STATE FAIR	24/20/73 OZ	\$30.34 CS

Add new products using Edit Group

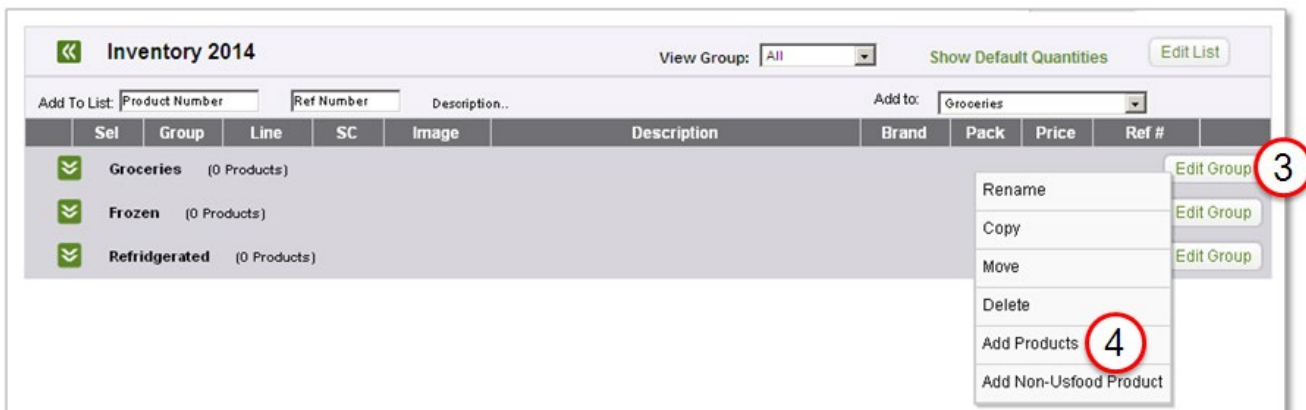
- From the Lists menu, click on **Manage Lists**.



- Click on the double green arrows to open the list.









- To add products to a group, click on **Edit Group**
- Select **Add Products**.






5. Enter product numbers. Product description will appear after the enter key is pressed.
6. After the first 5 products are entered the screen will open a new field.
7. Click on **Add** or **Add Products** to add products to the group and close the window.

Manage List

Filter list by...  Display All   

 **Inventory 2014** View Group: 

Add To List:

Sel	Group	Line	SC	Image	Description
	Groceries (0 Products)				
	Frozen (0 Products)				
	Refridgerated (0 Products)				

Enter Product Numbers below:

5

4571683

COBBLER, CHERRY RAW FOIL PAN FROZEN

996728

COBBLER, APPLE RAW FOIL PAN FROZEN

1400571

DRINK BASE, LEMONADE 5:1 LIGHT BAG-IN-BOX SHELF ST

1328038

DRINK MIX, LEMONADE 2 GAL YIELD POWDER POUCH

5274998

COOKIE, VANILLA WAFER

6

Add

7

Add Products

Close

Add Non USF Products

- From the Lists menu, click on **Manage Lists**.
- Click on **Edit Group**.
- Click on **Add Non-US Food Product**

The screenshot shows the 'Lists' menu with 'Manage Lists' circled in red (A). Below it, the 'Inventory 2014' group edit screen is shown. The 'Add to:' dropdown is set to 'Groceries'. The 'Edit Group' button is circled in red (B). The 'Add Non-US Food Product' button is circled in red (C).

- The new non-US Foods product will appear at the bottom of the group.
- Click on the product number to add details.

Manage List

Filter list by...

Inventory 2014 View Group: **PROTEIN** Show Default Quantities Edit List

Add To List: Product Number Ref Number Description.. Add to: **PROTEIN**

	Sel	Group	Line	SC	Image	Description	Brand	Pack	Price	Ref #	
		Groceries	(0 Products)								Edit Group
		Frozen	(0 Products)								Edit Group
		Refrigerated	(0 Products)								Edit Group
		PROTEIN	(7 Products)								Edit Group
	<input type="checkbox"/>	PROTEIN	1			BEEF, BRISKET FULL SELECT 120 DECKLE OFF RAW REF (ALT # 100600) (3710274)	IBP-IOWA BEEF PROCESSORS	5/14 LBA	\$3.48 LB		
	<input type="checkbox"/>	PROTEIN	2			CHICKEN, NUGGET DINOSAUR SHAPED .66 OZ BREADED BREAST MEAT CHILD-NUTRITION (ALT # 101100) (4101101)	TYSON	10.31 LB	\$34.20 CS		
	<input type="checkbox"/>	PROTEIN	3			PORK, RIB ST. LOUIS STYLE 2.75 LB DOWN RAW FROZEN (ALT # 100800) (313569)	MAPLE LEAF MEAT	36 LBA	\$3.22 LB		
	<input type="checkbox"/>	PROTEIN	4			BEEF SUB, PATTY MEATLESS VEGETABLE 3 GRAIN COOKED FROZEN VEGGIE BURGER 4.25 (1792399) scoop	CHEF'S LINE	36/4.25 OZ	\$59.24 CS		
	<input type="checkbox"/>	PROTEIN	5			BEEF, PATTY GROUND STEAK BURGER 4 OZ PUB COOKED FROZEN (4383055)	CATTLEMAN'S SELECTION	40/4 OZ	\$62.73 CS		
	<input type="checkbox"/>	PROTEIN	6			BEEF SUB, PATTY MEATLESS BURGER BLACK BEAN SPICY COOKED FROZEN VEGETABLE (9164641)	MORNINGSTAR FARMS	4/12/3.3 OZ	\$71.10 CS		
	<input type="checkbox"/>	PROTEIN	7			NON USF PROD 100000013 1000000013	NONE	NONE	No Price		

- F. If Vendor and GL codes have been setup, they can be added from the drop down list.
- G. To enter pricing, first click on **Price Override**, then enter the price.
- H. Click on **Save** at the bottom of the screen.
- I. Click on **Close** at the top of the screen.
- J. Repeat this process for all non-US Foods products.
- K. Make sure to enter a value in Average Net Weight or inventory reports will not calculate correctly.

Non USF Product Detail
Printer Friendly
Close

Description: Shark Steaks
Product #: 1000000013
Reference:
Brand: Reykjavik
Mfr. Prod. #: 12345
Avg. Net Wgt.: 10
Pack Size: 10 lbs

☐ Kosher
☐ Partial Units Available
☐ Special Order
☐ Just-In-Time (JIT)

Inventory Detail

Group: PROTEIN
Reference:
Vendor: Icelandic
General Ledger: Meats

Inv. Unit Desc: CS
Inv. Units / Full: 1
Inventory Price: 95.25 per CS
Price Override: ☒

Par Stock Quantities

Quantities should be placed in the space(s) next to the day(s) you place your order.

Sun: 0 Mon: 0 Tue: 0 Wed: 0 Thur: 0 Fri: 0 Sat: 0

Product Information Saved
Save Updates

Add Par Levels

Par levels can be added for products on the shopping / inventory list. The par levels will print on the Order Guide or Shopping list when selected from the order entry screen.

They will also appear on the Inventory Worksheet.

When an inventory is entered, the system can “suggest” an order based on the par values.

- A. From the Lists menu, click on **Manage Lists**.
- B. Double click on the green arrows in front of the list you will be editing.

The screenshot shows the 'Lists' menu on the left with 'Manage Lists' circled in red and labeled 'A'. To the right, the 'Manage Lists' window is open, showing a list of inventory lists. The first two items, 'Inventory 2013' and 'Inventory 2014', have green double arrows circled in red and labeled 'B'.

Lists	Reports	Tools	Invoices
<u>Lists</u>	<u>Inventory</u>		
Manage Lists	Manage Inventory		
Download List	Create Inventory		
Download OG	Inventory Worksheet		
Upload List	Inventory Cost		
Create List	Inventory Cost Comparison		
Print List	Manage Vendors		
	Manage General Ledger		

Manage Lists	
Add New List	
» Inventory 2013	Options
» Inventory 2014	Options
» Inventory 2014 demo	Options
» Master (SL)	Options
» New Scoop	Options
» Order Guide (# 999559)	Options

- C. To access the Inventory tab for the product, click on the product number.

The screenshot shows the 'Inventory 2014' window. At the top, there's a 'View Group' dropdown set to 'FROZEN FOOD' and a 'Show Default Quantities' button. Below this is a table of products. The first row is highlighted, and the product number '7' is circled in red and labeled 'C'.

Inventory 2014											
View Group: FROZEN FOOD										Show Default Quantities	Edit List
Add To List:	Product Number	Ref Number	Description...	Add to:	PROTEIN						
Sel	Group	Line	SC	Image	Description	Brand	Pack	Price	Ref #		
☑	FROZEN FOOD	7			COBBLER, CHERRY RAW FOIL PAN FROZEN (4571683)	HILLTOP HEARTH	4/5 LB	\$58.81 CS		X	
☑	FROZEN FOOD	8			COBBLER, APPLE RAW FOIL PAN FROZEN (996728)	HILLTOP HEARTH	4/5 LB	\$44.11 CS		X	
☑	FROZEN FOOD	9			COBBLER, PEACH RAW FOIL PAN FROZEN ARTIFICIALLY FLAVORED (4571600)	HILLTOP HEARTH	4/5 LB	\$50.36 CS		X	
☑	FROZEN FOOD	10			PIE, CHOCOLATE CREAM "M" THAW & SERVE FROZEN (4578423)	HILLTOP HEARTH	6/27 OZ	\$42.67 CS		X	

- D. Use the scroll bar to move to the bottom of the inventory tab.
- E. Enter the par levels for selected order days and click **Save**.
- F. Move to the top of the Product Detail screen and click on **Close**.
- G. Repeat this process for all products on the list.

Important!!

- Par levels are attached to the list – not the product number.
- If a new list is created from scratch, the par levels must be re-entered for each product.
- To avoid re-entering this information when a new list is created, copy the original list with the par levels and then edit the new list as needed.

Inventory Worksheet

- The inventory worksheet can be displayed in either PDF or Excel CSV formats
- PDF is the recommended format for printing

Inventory Worksheet

Select the desired list from the dropdown menu below. You may also optionally choose a specific group or page range to be included in the report. Press CREATE REPORT to begin report generation.

Select List:

Select Options:

☒ By Group:

☐ By Line: Starting Line #: Continue to line #:

Select Report Format:

Inventory Worksheet - PDF version

US Foods Inventory Worksheet - Inventory 2014
 Customer: TRAINING-US FOOD.COM (21004262) Division: CHICAGO (2099)

Product Line #	Status	Description	Brand Ref #	Pack Size Last Buy Date	OnHand/Order(Line#)	\$Full \$Part	Units/Full GL	Units/Full VN
3710274	1	BEEF, BRISKET FULL SELECT 120 DECKLE OFF RAW REF (ALT # 100600)	IBP-IOWA BEEF PROCESSORS	5/14 LBA	(1)	\$3.48 LB	10Meat	1/LB USF
4101101	2	CHICKEN, NUGGET DINOSAUR SHAPED .66 OZ BREADED BREAST MEAT CHILD-NUTRITION (ALT # 101100)	TYSON	10.31 LB	(2)	\$34.20 CS	10Meat	250/CS USF
313569	3	PORK, NO. 1, CURED STYLE 2.75 LB DOWN TOWN FROZEN (ALT # 100900)	MAPLE LEAF MEAT	36 LBA	(3)	\$3.22 LB	10Meat	1/LB USF
1792399	3	BEEF SUB, PATTY MEATLESS FROZEN VEGGIE BURGER 4.25	CHEF'S LINE	36/4.25 OZ	(4)	\$59.24 CS	10Meat	1/CS USF
4571600	9	COBBLER, PEACH RAW FOIL PAN FROZEN ARTIFICIALLY FLAVORED	HILLTOP HEARTH	4/5 LB	(9)	\$58.81 CS	200roc	4/5 lbs USF
4578423	10	PIE, CHOCOLATE CREAM 10" THAW & SERVE FROZEN	HILLTOP HEARTH	6/27 OZ	(10)	\$42.67 CS	200roc	6/Pies USF
6340301	11	BREAD, WHITE 4.25X4.5" 17 SLICED 3/4" LOAF BAKED FROZEN TEXAS TOAST	HILLTOP HEARTH	10/24 OZ	(11)	\$36.28 CS	200roc	10/CS USF

When par values are entered into the shopping list, they appear under the product description of the Inventory Worksheet and the Shopping List when printed during order entry.



Inventory Worksheet - Inventory 2014

Customer: TRAINING-US FOOD.COM (21004262)

Division: CHICAGO (2099)

Product Line #	Status	Description	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Brand Ref #	Pack Size	Last Buy Date	OnHand/Order(Line#)	\$Full \$Part	GL	Units/Full	VN
PROTEIN																	
3710274	1	BEEF, BRISKET FULL SELECT 120 DECKLE OFF RAW REF (ALT # 100600)	2	2	2	2	2	2	2	IBP-IOWA BEEF PROCESSORS	5/14 LBA	(1)		\$3.48 LB	10Meat	1LB	USF
4101101	2	CHICKEN, NUGGET DINOSAUR SHAPED .66 OZ BREADED BREAD MEAT CHILD-NUTRITION (ALT # 101100)	3	2	1	2	2	3	3					\$34.20 CS	10Meat	250CS	USF
313569	3	PORK, RIB ST. LOUIS STYLE 2.75 LB DOWN RAW FROZEN (ALT # 100800)	3	2	1	2	2	3	3					\$3.22 LB	10Meat	1LB	USF
1792399	4	BEEF SUB, PATTY MEATLESS VEGETABLE 3 GRAIN COOKED FROZEN VEGGIE BURGER 4.25	1	1	1	1	1	1	1						10Meat	1CS	USF
4383055	5	BEEF, PATTY GROUND STEAK BURGER 4 OZ PUB COOKED FROZEN	3	2	4	5	5	5	5						10Meat	1CS	USF
9164541	6	BEEF SUB, PATTY MEATLESS BURGER BLACK BEAN SPICY COOKED FROZEN VEGETABLE	3	1						MC				\$71.10 CS	10Meat	1CS	USF
FROZEN FOOD																	
4571653	7	COBBLER, CHERRY RAW FOIL PAN FROZEN	1	1										\$58.81 CS	20Groc	4/5 lbs	USF
996728	8	COBBLER, APPLE RAW FOIL PAN FROZEN	1	1						ARTH	4/5 LB	(8)		\$44.11 CS	20Groc	4/5 lbs	USF
4571600	9	COBBLER, PEACH FLAVORED	1	1						ARTH	4/5 LB	(9)		\$50.36 CS	20Groc	4/5 lbs	USF
4578423	10	PIE, CHOCOLATE CREAM 10" THAW & SERVE FR	1	1						ARTH	6/27 OZ	(10)		\$42.67 CS	20Groc	6Pies	USF
6340301	11	BREAD, WHITE 4.25X4.5" 17 SLICED 3/4" LOAF B	1	1						ARTH	10/24 OZ	(11)		\$36.28 CS	20Groc	10CS	USF

GL # and Account Names – when setup and assigned to products on the selected shopping list, the GL # will appear in this column.

GL # ▲	Account Name
10Meat	Meats
15Prdc	Produce
20Groc	Groceries
30Chem	Chemicals and Cleaning
40Papr	Paper
50Eqmt	Equipment



Inventory Worksheet - Inventory 2014

Customer: TRAINING-US FOOD.COM (21004262)

Division: CHICAGO (2099)

Product Line #	Status	Description	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Brand Ref #	Pack Size	Last Buy Date	OnHand/Order(Line#)	\$Full \$Part	GL	Units/Full	VN
PROTEIN																	
3710274	1	BEEF, BRISKET FULL SELECT 120 DECKLE OFF RAW REF (ALT # 100600)	2	2	2	2	2	2	2	IBP-IOWA BEEF PROCESSORS	5/14 LBA	(1)		\$3.48 LB	10Meat	1LB	USF
4101101	2	CHICKEN, NUGGET DINOSAUR SHAPED .66 OZ BREADED BREAD MEAT CHILD-NUTRITION (ALT # 101100)	3	2	1	2	2	3	3					\$34.20 CS	10Meat	250CS	USF
313569	3	PORK, RIB ST. LOUIS STYLE 2.75 LB DOWN RAW FROZEN (ALT # 100800)	3	2	1	2	2	3	3					\$3.22 LB	10Meat	1LB	USF
1792399	4	BEEF SUB, PATTY MEATLESS VEGETABLE 3 GRAIN COOKED FROZEN VEGGIE BURGER 4.25	1	1	1	1	1	1	1						10Meat	1CS	USF
4383055	5	BEEF, PATTY GROUND STEAK BURGER 4 OZ PUB COOKED FROZEN	3	2	4	5	5	5	5						10Meat	1CS	USF
9164541	6	BEEF SUB, PATTY MEATLESS BURGER BLACK BEAN SPICY COOKED FROZEN VEGETABLE	3	1										\$71.10 CS	10Meat	1CS	USF
FROZEN FOOD																	
4571653	7	COBBLER, CHERRY RAW FOIL PAN FROZEN	1	1										\$58.81 CS	20Groc	4/5 lbs	USF
996728	8	COBBLER, APPLE RAW FOIL PAN FROZEN	1	1										\$44.11 CS	20Groc	4/5 lbs	USF
4571600	9	COBBLER, PEACH RAW FOIL PAN FROZEN ARTI FLAVORED	1	1										\$50.36 CS	20Groc	4/5 lbs	USF
4578423	10	PIE, CHOCOLATE CREAM 10" THAW & SERVE FR	1	1										\$42.67 CS	20Groc	6Pies	USF
6340301	11	BREAD, WHITE 4.25X4.5" 17 SLICED 3/4" LOAF B	1	1										\$36.28 CS	20Groc	10CS	USF

Inventory Units Descriptions and Inventory Units Per Full Case – will appear in this column. Changes made on the inventory tab to this value will also appear.

Details

Nutritional

Inventory

Par Stock

Standing Order

Inventory Detail

Group:

FROZEN FOOD

Reference:

US Foods

General Ledger:

Groceries

Inv. Unit Desc:

Pies

Inv. Units / Full:

6

Inventory Price:

42.67

Price Override:

☒

Inventory Worksheet – CSV Version

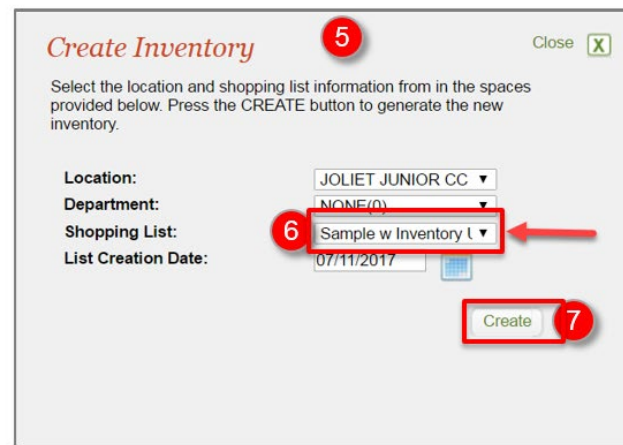
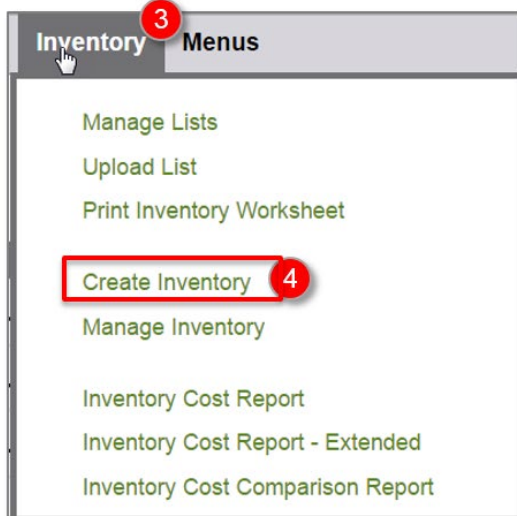
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	
1	Inventory	Worksheet - Inventory 2014																				
2	Customer: TRAINING-US FOOD.COM (21004262) Division: CHICAGO (2099)																					
3	Group	Product	Line #	Status	Description	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Brand	Reference	Pack Size	Last Buy	D OnHand/C	\$Full	\$Part	Units/Full	GL	Vendor
4	PROTEIN	3710274	1		BEEF, BRIS	2	2	2	2	2	2	2	2	IBP-IOWA BEEF PROC	5/14 LBA			\$3.48 LB	\$0.00 EA	1/LB	10Meat	USF
5	PROTEIN	4101101	2		CHICKEN, I	3	2	1	2	2	2	3	3	TYSON	10.31 LB			\$34.20 CS	\$0.00 EA	250/CS	10Meat	USF
6	PROTEIN	313569	3		PORK, RIB	3	2	1	2	2	2	3	3	MAPLE LEAF MEAT	36 LBA			\$3.22 LB	\$0.00 EA	1/LB	10Meat	USF
7	PROTEIN	1792399	4		BEEF SUB,	1	1	1	1	1	1	1	1	CHEF'S LINE	36/4.25 OZ			\$59.24 CS	\$0.00 EA	1/CS	10Meat	USF
8	PROTEIN	4383055	5		BEEF, PATT	3	2	4	5	5	5	5	5	CATTLEMAN'S SELECT	40/4 OZ			\$62.73 CS	\$0.00 EA	1/CS	10Meat	USF
9	PROTEIN	9164641	6		BEEF SUB,	3	1	1	2	2	2	3	3	MORNINGSTAR FARM	4/12/3.3 OZ			\$71.10 CS	\$0.00 EA	4/CS	10Meat	USF
10	FROZEN FC	4571683	7		COBBLER,	1	1	1	2	2	2	2	3	HILLTOP HEARTH	4/5 LB			\$58.81 CS	\$0.00 EA	4/5 lbs	20Groc	USF
11	FROZEN FC	996728	8		COBBLER,	1	1	1	2	2	2	2	3	HILLTOP HEARTH	4/5 LB			\$44.28 CS	\$0.00 EA	4/5 lbs	20Groc	USF
12	FROZEN FC	4571600	9		COBBLER,	1	1	1	2	2	2	2	3	HILLTOP HEARTH	4/5 LB			\$50.36 CS	\$0.00 EA	4/5 lbs	20Groc	USF
13	FROZEN FC	4578423	10		PIE, CHOC	1	1	1	2	2	2	2	3	HILLTOP HEARTH	6/27 OZ			\$42.67 CS	\$0.00 EA	6/Pies	20Groc	USF
14	FROZEN FC	6340301	11		BREAD, WI	1	1	1	2	2	2	2	3	HILLTOP HEARTH	10/24 OZ			\$36.28 CS	\$0.00 EA	10/CS	20Groc	USF
15	FROZEN FC	5734900	12		COOKIE, C	1	1	1	2	2	2	2	3	GRANDMAS FRITO LA	60/2.5 OZ			No Price	\$0.00 EA	1/CS	20Groc	USF
16	FROZEN FC	8328767	13		CORN ON	1	1	1	2	2	2	2	3	MONARCH	96 EA			No Price	\$0.00 EA	0/N/A	20Groc	USF
17	FROZEN FC	5009444	14		DOUGH, TI	1	1	1	2	2	2	2	3	HOLLY RIDGE	120/3 OZ			No Price	\$0.00 EA	120/CS	20Groc	USF
18	FROZEN FC	7364995	15		ONION STI	1	1	1	2	2	2	3	3	MOORES	6/2 LB			No Price	\$0.00 EA	6/CS	20Groc	USF
19	FROZEN FC	1000611	16		POTATO, F	1	1	1	2	2	2	3	3	LAMBS NATURAL	6/4.5 LB			\$41.93 CS	\$0.00 EA	6/CS	20Groc	USF
20	REFRIGERA	4985693	17		CHEESE, C	1	1	1	2	2	2	3	3	GLENVIEW FARMS	4/2.5 LB			\$45.95 CS	\$0.00 EA	4/CS	20Groc	USF
21	REFRIGERA	3587573	18		CHEESE, P	1	1	1	2	2	2	3	3	ROSELI	4/5 LB			\$114.49 C	\$32.92 EA	4/CS	20Groc	USF

Audit an Inventory List

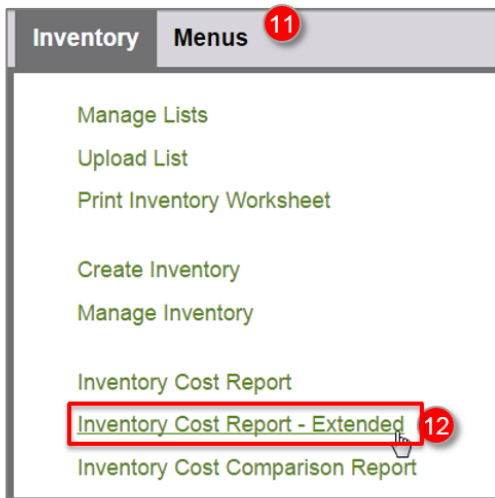
Create invoice report to use for audit

From the US Foods Online home page:

1. Click on **My Business**.
2. Click on **Manage Inventory**. The Inventory page will appear.
3. Click on **Inventory**.
4. Click on **Create Inventory**.
5. The **Create Inventory** box will appear.
6. Select the Shopping List (Inventory List) you wish to audit.
7. Click **Create**.



8. The Manage Inventories screen will appear.
9. Open the newly created inventory.
10. Scroll to the bottom of the screen and click on "Get Price".
11. Scroll to the top of the screen and click on Inventory. The Inventory menu will appear.
12. Click on Inventory Cost Report – Extended.
13. Select the date of the report to audit. Enter the date as the Start and End date.
14. Select Include Lists with zero inventory values.
15. Click on Create Report.



The screenshot shows the 'Inventory' menu with the 'Menus' tab selected. The menu items are: Manage Lists, Upload List, Print Inventory Worksheet, Create Inventory, Manage Inventory, Inventory Cost Report, **Inventory Cost Report - Extended** (highlighted with a red box and a red circle with the number 12), and Inventory Cost Comparison Report. A red circle with the number 11 is next to the 'Menus' tab.



The screenshot shows the 'Inventory Cost Report - Extended' form. The form has a title bar with 'Close' and a close button. The main content area contains the following fields and options:

- Start Date:** A date input field with '07/11/2017' and a calendar icon. A red box and a red circle with the number 13 highlight this field.
- End Date:** A date input field with '07/11/2017' and a calendar icon. A red box and a red circle with the number 13 highlight this field.
- Include lists with zero inventory values:** A checkbox that is checked. A red box and a red circle with the number 14 highlight this checkbox.
- Report Format:** A dropdown menu with 'CSV Report (EXCEL)' selected. A red circle with the number 15 is next to the dropdown.
- Create Report:** A button at the bottom right. A red box and a red circle with the number 15 highlight this button.

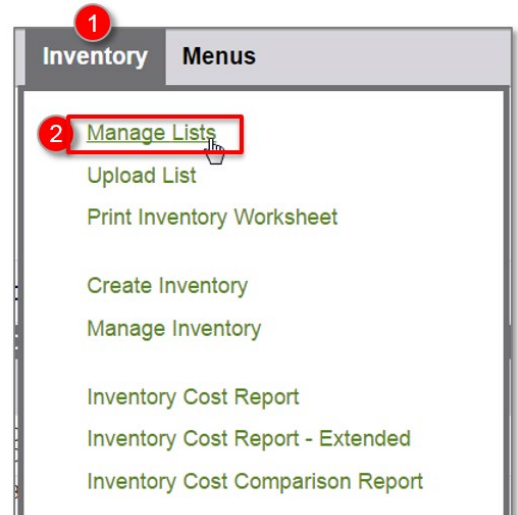
Audit the Report

1. Column X – Units / Full –
 - a) Most values are automatically populated to match the pack size. Some values automatically populate to 1/cs. Audit this column to make sure the inventory count values are correct.
 - b) To count the inventory by individual units, the values in this column should match the pack size or can be customized to a unique value.
 Example: Line #1 is crab claws. The units/full is set to 12/cs. You can leave as is or change to 12/boxes for a more descriptive inventory unit name. Since each claw costs approximately \$1.44, you may want to count individual claws. To do this, calculate the number of claws per case and update. For this product, it would be 500 (units) /claws (full) per case.
2. Column AM – CustPrdOvd – Customer Product Override
 - a) USF Products - A "Y" in this column indicates the price has been overridden. The current price is captured in column AN – CasePriceOvrn (Case Price Overriden). The price in column AB – Cost is the manually entered price that will be used to calculate the value of the inventory.

	G	H	I	J	L	O	X	Y	Z	AA	AB	AC	AM	AN	AO
1															
2	GrpName	Product	Line #	Description	PackSz	Vendor	Units/Full	\$Full	UOM	\$Part	Cost	ExtPrc	CustPrdOvd	CasePriceOvrn	EachPriceOvrn
3	Appetizers	9459017	1	CRAB, SNOW CLAW COCKTAIL 16-25 COUNT IN SHELL COOKED FROZEN	12/2 LB	USF	12/CS	0	CS	\$0.00 EA	727.2	0	N	0	0
4	Appetizers	7127324	2	BEEF, PATTY GROUND 78/22 6:1 ROUND .75" THICK NATURAL RAISED-W/O-ANTIBIOTICS	60/2.67 OZ	USF	1/CS	0	CS	\$0.00 EA	54.98	0	N	0	0
5	Appetizers	9641620	3	SHRIMP, RAW 16-20 RED PEELED-&-DEVEINED TAIL-ON IQF FROZEN IMPORTED ARGENTINA	5/2 LB	USF	1/CS	0	CS	\$0.00 EA	85.63	0	N	0	0
6	Open Air 1	1E+09	4	JUICE VEGETABLE 100 CAN SHELF STABLE ALT # 3011640	48/5.5 OZ	def	48/5.5 OZ	0	CS	\$0.00 EA	0	0	N	0	0
7	Open Air 1	1E+09	5	JUICE TOMATO 100 CAN SHELF STABLE ALT # 3011640	48/5.5 OZ	USF	48/5.5 OZ	0	CS	\$0.00 EA	10	0	Y	0	0
8	Chip Snacks	6283501	6	COOKIE, CHOCOLATE CHIP SS (ALT # 3011640)	60/2 OZ	USF	60/2 OZ	0	CS	\$0.00 EA	10	0	Y	20.39	0
9	Chip Snacks	5570221	7	CHIP, CHEESE CRUNCHY HOT BAG SNACK (ALT # 3011640)	64/1.5 OZ	USF	64/1.5 OZ	0	CS	\$0.00 EA	10	0	Y	27.12	0
10	Chip Snacks	5602008	8	CHIP, POTATO KETTLE SEA SALT & VINEGAR SS BAG (ALT # 3011640)	64/1.375 OZ	USF	1/cs	0	CS	\$0.00 EA	27.12	0	N	0	0

Update inventory values using the Manage Lists and the Product Detail Screen

1. From the Inventory screen, click on the Inventory menu.
2. Click on Manage Lists
3. From the Manage Lists screen, select the list to update by clicking on the green box in front of the list.
4. To update inventory values, click on the product number. The product detail screen will appear.



3 >> Sample w Inventory Units

Appetizers								
Appetizers	1			CRAB, SNOW CLAW COCKTAIL 16-25 COUNT IN SHELL COOKED FROZEN (9459017)	PACKER	12/2 LB	727.20	0.00
Appetizers	2			BEEF, PATTY GROUND 78/22 6:1 ROUND, 75% THICK NATURAL RAISED-W/O-ANTIBIOTIC (7127324) scoop	STOCK YARDS	60/2.67 OZ	54.98	0.00
Appetizers	3			SHRIMP, RAW 16-20 RED PEELED-&-DEVEINED TAIL-ON IQF FROZEN IMPORTED ARGENT (9641620) scoop	HARBOR BANKS	5/2 LB	85.63	0.00

5. Click the Inventory tab on the Product Detail screen.
6. Update the needed values on this screen.
7. Make sure the price override is not selected for US Foods products UNLESS you wish to override the current price.
8. When the price override is unselected, the current price will display.
9. Use the slider bar to scroll to the bottom of the screen.
10. Click Save to save the updated values.
11. For more details – see Update Inventory Units.

Product Detail Printer Friendly Close

CRAB, SNOW CLAW COCKTAIL 16-25 COUNT IN SHELL COOKED FROZEN

Product Number: 9459017
Brand Name: PACKER
Package Size: 12/2 LB
Sold By: CS
Partial Units Available: No
Price Full: \$727.20 CS

Details **Nutritional** **Inventory** 5

Par Stock Standing Order

Inventory Detail

Group: Appetizers
Reference:
Vendor: US Foods
General Ledger: Unknown

Inv. Unit Desc: Claws
Inv. Units / Full: 500
Inventory Price: 200 per CS
Price Override: ☒ 6 7

Par Stock Quantities
Quantities should be placed in the space(s) next to the day(s) you place your order.
Sun: 0 Mon: 0 Tue: 0 Wed: 0 Thu: 0 Fri: 0 Sat: 0

Details **Nutritional** **Inventory** 8

Par Stock Standing Order

Vendor: US Foods
General Ledger: Unknown

Inventory Price: 727.20 CS
Price Override: ☐ 8

Par Stock Quantities
Quantities should be placed in the space(s) next to the day(s) you place your order.
Sun: 0 Mon: 0 Tue: 0 Wed: 0 Thu: 0 Fri: 0 Sat: 0

Save

Inventory Cost Reports

- Calculates the cost of your current inventory on-hand.
- Information can be displayed/printed in a variety of ways:

General Ledger with Subtotal Detail

- Categorized by your general ledger categories with products listed below each general ledger

General Ledger without Subtotal Detail

- Summarized by your General Ledger categories with no products listed

Product Description

- Alphabetized by product description

Extended Value

- Sorted in descending dollar order

Line Number

- Sorted in the same order as the Inventory Worksheet

Product Number

- Sorted in ascending product number order

Inventory Reports

- A. Click on Inventory Cost
- B. Select report options

Lists **Reports** **Tools** **Invoices**

Lists

- Manage Lists
- Download List
- Download OG
- Upload List
- Create List
- Print List

Inventory

- Manage Inventory
- Create Inventory
- Inventory Work
- Inventory Cost**
- Inventory Cost
- Manage Vendo
- Manage Gener

Inventory Cost Report Close X

Select from the report parameters listed below. Press CREATE REPORT to begin report generation.

Select Date:

Select Inventory:

Report Format:

Sort By:

- Description (ascending)
- Extended Value (descending)
- GL# With Sub Total Detail (ascending)
- GL# Without Sub Total Detail (ascending)
- Line# (ascending)
- Product# (ascending)

CREATE REPORT

Inventory Cost – Description Ascending

US FOODS

Inventory Cost - 01/01/2014

Customer: TRAINING-US FOOD.COM (21004262)

Division: CHICAGO (2099)

Product	Status	Description	Brand	Pack Size	UOM	Units/Full	Full	Part	Cost	Extended					
Inventory 2014															
8004574		BAG, FOOD STORAGE 6X6 UTILITY FLIP TOP CLEAR PLASTIC RACLETTE PACK SANDWICH (ALT # 112953)	HANDGARDS	2000 EA	CS	10/CS	1.00	0.00	\$37.24	\$37.24					
4327560		BANANA, TURIN FRESH REF	PACKER	10 LB	CS	10/CS	2.00	0.00	\$13.31	\$26.62					
4320654		BEAN, GREEN ITALIAN CUT CANNED	MORNING	58/10 CN	CS	6/CS	0.00	0.00	\$0.00	\$0.00					
7332349		BEAN, REFRIRED CANNED	EL PASADO	58/10 CN	CS	6/CS	12.00	0.00	\$42.94	\$511.68					
9164641		BEEF SUB, PATTY MEATLUSK BLENDED BROWN GRAVY COOKED FROZEN VEGETABLE SAUCE BRAIN FREE	MORNINGSTAR FARMS	412/3.3 OZ	CS	4/CB	2.00	0.00	\$72.10	\$144.20					
1792390		BEEF SUB, PATTY MEATLUSK BLENDED BROWN GRAVY COOKED FROZEN VEGGIE BURGER	CHEESE	412/3.3 OZ	CS	4/CB	2.00	0.00	\$59.24	\$118.48					
3710274		BEEF, BRISKET FULL SELLER 100 DECKLE 1/2 LBS (ALT # 100905)	BRISKE	1/2 LB	CS	1/CS	0.00	0.00	\$3.47	\$437.29					
4383055		BEEF, PATTY GROUND STEAK BURGER 4 OZ PUB COOKED FROZEN	CATTLEMAN'S SELECTION	404 OZ	CS	1/CS	2.00	0.00	\$62.73	\$125.46					
6342031		BREAD, WHITE 4.25X4 1/2 7 SLICED 3/4 LOAF BAKED FROZEN TEXAS TOAST	HILLTOP HEARTH	105/4 OZ	CS	10/CS	2.00	0.00	\$37.28	\$74.56					
1490960		CARRIER, DRINK 4 CUP 8-32 OZ MOLDED FIBER WFO HANDLE CARRIER MOVER PAPER (ALT # 110403)	I PACTIV	300 EA	CS	1/CS	1.00	0.00	\$62.65	\$62.65					
3419660		CARROT, JUMBO #1 GRADE BAG FRESH REF	CROSS VALLEY FARMS	25 LB	CS	1/CS	1.00	0.00	\$20.45	\$20.45					
8306415		CAULIFLOWER, WHITE FLORET POLY PACK FRESH REF	CROSS												
9650242		CHAFER, FOOD FULL SIZE RECTANGLE WIRE POP UP SET (ALT # 112705)		A	B	C	D	E	F	G	H	I	J	K	
4985693		CHEESE, CHeddar MILD BLEND 75 OZ TRAY YELLOW REF	GLE	1	Inventory Cost - 01/01/2014										
3587673		CHEESE, PARMESAN SHRED BAG 10 OZ IMPORT ARGENTINA		2	Customer: TRAINING-US FOOD.COM (21004262) Division: CHICAGO (2099)										
4101101		CHICKEN, NUGGET DINOSAUR SHAPED #6 OZ BREAZED BREAST MEAT CHILD NUTRITION (ALT # 101100)		3	Product	Status	Descriptive	Brand	Pack Size	UOM	Units/Full	Full	Part	Cost	Extended
813380		CLEANER, DISINFECTANT CONCENTRATE JUG BLUE 3-1 OPEN LOOP	SP	4	Inventory 2014										
7561626		CLEANER, FLOOR 6-2 LIGD BOTTLE PINK NO RHNE	SP	5	8004574	BAG, FOOD STORAGE 6X6 UTILITY FLIP TOP CLEAR PLASTIC RACLETTE PACK SANDWICH (ALT # 112953)	EA	CS	10/CS	1	0	\$37.24	\$37.24		
5603222		CLEANER, FLOOR MULTI-PURPOSE LIQUID GREEN	SP	6	4037560	BANANA, TURIN FRESH REF	10 LB	CS	10/CS	2	0	\$13.31	\$26.62		
8367967		CLEANER, FLOOR QUARRY TILE K17 LIQUID JUG GREEN	CI	7	4320654	BEAN, GREEN ITALIAN CUT CANNED	58/10 CN	CS	6/CS	1	0	\$0.00	\$0.00		
4342705		CLEANER, GLASS & SURFACE K16 CENTRIZATE JUG CLEAR DARK BLUE	CI	8	7332349	BEAN, REFRIRED CANNED	58/10 CN	CS	6/CS	12	0	\$42.94	\$511.68		
1551647		CLEANER, GLASS & SURFACE K26 E-2 LIQUID JUG BLUE FLORAL SCENT	CI	9	9164641	BEEF SUB, PATTY MEATLUSK BLENDED BROWN GRAVY COOKED FROZEN VEGETABLE SAUCE BRAIN FREE	412/3.3 OZ	CS	4/CB	2	0	\$72.10	\$144.20		
996728		COBBLER, APPLE RAW FOL PAN FROZEN	HL	10	1792390	BEEF SUB, PATTY MEATLUSK BLENDED BROWN GRAVY COOKED FROZEN VEGGIE BURGER	412/3.3 OZ	CS	4/CB	2	0	\$59.24	\$118.48		
996728		COBBLER, APPLE RAW FOL PAN FROZEN	HL	11	3710274	BEEF, BRISKET FULL SELLER 100 DECKLE 1/2 LBS (ALT # 100905)	1/2 LB	CS	1/CS	2	0	\$3.47	\$437.29		
4571816		COBBLER, BLACKBERRY RAW FOL PAN FROZEN HOMESTYLE	HL	12	4383055	BEEF, PAT CATTLEMAN'S SELECTION	404 OZ	CS	1/CS	2	0	\$62.73	\$125.46		
4571883		COBBLER, CHERRY RAW FOL PAN FROZEN	HL	13	6340301	BREAD, WHILLTOP H10/24 OZ CS	10/CS	2	0	\$37.28	\$74.56				
4571883		COBBLER, CHERRY RAW FOL PAN FROZEN	HL	14	1499660	CARRIER, I PACTIV	300 EA	CS	1/CS	1	0	\$62.65	\$62.65		
4571800		COBBLER, PEACH RAW FOL PAN FROZEN ARTIFICIALLY	HL	15	3419660	CARROT, JUMBO #1 GRADE BAG FRESH REF	25 LB	CS	1/CS	1	0	\$20.45	\$20.45		
				16	8326415	CAULIFLOWER, CROSS VA 2/3 LB	CS	2/CS	1	0	\$21.67	\$21.67			
				17	9650342	CHAFER, F STERNO 4/1 ST CS	1/CS	1	0	\$87.60	\$87.60				

Saturday 01 February 2014

Inventory Cost – Extended Value – Descending

US

FOODS

Inventory Cost - 01/01/2014

Customer: TRAINING-US FOOD.COM (21004262)

Division: CHICAGO (2099)

Product	Status	Description	Brand	Pack Size	UOM	Units/Full	Full	Part	Cost	Extended
Inventory 2014										
1302049		BEAN, REFRED CANNED	ELPASADO	6#10 CN	CS	6/CS	12.00	0.00	\$42.94	\$511.68
3710214		BEEF, BRISKET FULL SELECT 120 DECKLE OFF RAW REF (ALT # 100800)	IBP-IOWA BEEF PROCESSORS	5/14 LBA	CS	1/LB	2.00	0.00	\$3.47	\$437.29
3987573		CHEESE, PARMESAN SHRED BAG REF IMPORTED ARGENTINA	ROSELI	4/5 LB	CS	4/CB	2.00	0.00	\$114.00	\$228.00
3015170		CONTAINER, PIE WEDGE 9" 1 CMPT PLASTIC CLEAR MINGED LID	ACTIV	8/63 EA	CS	8/CB	1.00	0.00	\$188.42	\$188.42
4571883		COBBLER, CHERRY RAW FROZEN	HELLO TOAST	4/5 LB	CS	4/CB	3.00	0.00	\$59.50	\$175.50
4571800		COBBLER, PEACH RAW FROZEN	HELLO TOAST	4/5 LB	CS	4/CB	3.00	0.00	\$50.36	\$151.08
9164641		BEEF SUB, PATTY MEATLESS BURGER BUN 4 OZ PATTY	MORNINGSTAR	4/5 LB	CS	4/CB	3.00	0.00	\$72.10	\$144.20
9967028		COBBLER, APPLE RAW FOL PAN FROZEN	HELLO TOAST	4/5 LB	CS	4/5 Bx	3.00	0.00	\$44.11	\$132.33
4383055		BEEF, PATTY GROUND STEAK BURGER 4 OZ PATTY COOKED FROZEN	CATTLEMAN'S SELECTION	40/4 OZ	CS	1/CB	2.00	0.00	\$62.73	\$125.46
2001444		PICKLE, DILL CRINKLE-UP CHIP 27/30-3500 COUNT 1/8" PAIL SHELF STABLE	MONARCH	5 GA	CS	1/CB	4.00	0.00	\$31.20	\$124.80
3975174		GLOVE, VINYL XL POWDERED NATURAL AMBIDEXTROUS (ALT # 100500)	MONOGRAM							
1792299		BEEF SUB, PATTY MEATLESS VEGETABLE 3 GRAIN COOKED FROZEN VEGETABLE BURGER 4.25	CHEF'S LIN							
3135959		PORK, RIB ST. LOUIS STYLE 27/5 LB DOWN RAW FROZEN (ALT # 100800)	MAPLE LEAF #1							
613380		CLEANER, DISINFECTANT CONCENTRATE, JUG BLUE 3-4-1 OPEN LOG	SPIC AND SPY							
3975158		GLOVE, VINYL MEDIAN POWDERED NATURAL AMBIDEXTROUS (ALT # 100600)	MONOGRAM							
1400571		DRINK BAE, LEMONADE 5-1 LIGHT BAG-IN-BOX SHELF STABLE	MINUTE MA							
6989674		TBISSE, TOILET BOWL ROLL 3 1/4"X3 1/4"X100 SHEET 2 PLY WHITE (ALT # 100800)	TORK							
1721293		SYRUP, FOUNTAIN ROOT BEER BARQS 5-1 BAG-IN-BOX	BARQS							
4004082		SYRUP, FOUNTAIN LEMON LIME SPRITE BAG-IN-BOX	SPRITE							
7601237		SYRUP, FOUNTAIN FRUIT PUNCH H-C 5-1 BAG-IN-BOX FLASHIN	H-C							
5004061		SYRUP, FOUNTAIN COLA DIET COKE CLASSIC BAG-IN-BOX	COKE							
5004067		SYRUP, FOUNTAIN COLA COKE CLASSIC BAG-IN-BOX	COKE							
6969095		GLOVE, VINYL LARGE LIGHTLY POWDERED NATURAL IMPORTED CHINA AMBIDEXTROUS	MONOGRAM							
4320266		FOL, ALUMINUM 17 1/2"X100" STANDARD ROLL CUTTER BOX WRAP	MONOGRAM							
3732406		DRESSING, RANCH BUTTERMILK 17 1/2"X100" PLASTIC JAR REF	MONARCH							
2002049		SYRUP, FOUNTAIN OR PEPPER BAG-IN-BOX	DR. PEPPER							

PDF Version

Inventory Cost - 01/01/2014										
Customer: TRAINING-US FOOD.COM (21004262) Division: CHICAGO (2099)										
Product	Status	Description	Brand	Pack Size	UOM	Units/Full	Full	Part	Cost	Extended
Inventory 2014										
7332349		BEAN, REFEL PASADO 6#10 CN	CS			6/CS	12	0	\$42.64	\$511.68
3710214		BEEF, BRIS IBP-IOWA 5/14 LBA	CS			1/LB	2	0	\$3.47	\$437.29
3587573		CHEESE, P ROSELI 4/5 LB	CS			4/CB	2	0	\$114.00	\$228.00
3015179		CONTAINI PACTIV 8/63 EA	CS			8/CB	1	0	\$188.42	\$188.42
4571683		CHEESE, HILTO H/4/5 LB	CS			4/5 LBS	3	0	\$58.50	\$175.50
4571600		CHEESE, HILTO H/4/5 LB	CS			4/5 LBS	3	0	\$44.11	\$132.33
9164641		BEEF SUB, MONTANA 4/12/5 LB	CS			4/5 LBS	3	0	\$72.10	\$144.20
9967028		COBBLER, HILTO H/4/5 LB	CS			4/5 LBS	3	0	\$44.11	\$132.33
4383055		BEEF, PAT CATTLEMAN 40/4 OZ	CS			1/CB	2	0	\$62.73	\$125.46
2001444		PICKLE, DI MONARCH 5 GA	CS			1/CB	4	0	\$31.20	\$124.80
3975174		GLOVE, VI MONOGR 10/100 EA	CS			10/CS	1	0	\$119.44	\$119.44
1792299		BEEF SUB, CHEF'S LIN 36/4.25 OZ	CS			1/CS	2	0	\$59.24	\$118.48
3135959		PORK, RIB MAPLE LE 36 LBA	CS			1/LB	1	0	\$3.22	\$115.92
613380		CLEANER, SPIC AND 2/1 GA	CS			1/CS	1	0	\$113.37	\$113.37

CSV Version

Saturday 01 February 2014

Inventory Cost – GL# with Subtotal Detail - Ascending

Inventory Cost - 01/01/2014										
Customer: TRAINING-US FOOD.COM (21004262)				Division: CHICAGO (2099)						
Product	Status	Description	Brand	Pack Size	UOM	Units/Full	Full	Part	Cost	Extended
GL10Meat - Meats										
3710274		BEEF, BRIS IBP-IOWA 5/14 LBA	CS	1/LB		2	0	0	\$3.47	\$437.29
4101101		CHICKEN, TYSON 10.31 LB	CS	250/CS		1	0	0	\$34.10	\$34.10
313569		PORK, RIB MAPLE LE/36 LBA	CS	1/LB		1	0	0	\$3.22	\$115.92
1792399		BEEF SUB, CHEF'S LIN 36/4.25 OZ	CS	1/CS		2	0	0	\$59.24	\$118.48
4383055		BEEF, PAT CATTLEM/40/4 OZ	CS	1/CS		2	0	0	\$62.73	\$125.46
9164641		BEEF SUB, MORNING/4/12/3.3 CS	CS	4/CS		2	0	0	\$72.10	\$144.20
GL Total: 10Meat - Meats										
GL15Prdc - Produce										
3529436		KALE, CURLY GREEN CLEANED & TRIMMED POLY PACK FRESH REF	CROSS VALLEY FARM							
3419660		CUCUMBER, FRESH REF	CROSS VALLEY FARM							
4705118		CUCUMBER, FRESH REF	CROSS VALLEY FARM							
4091770		STAND, PORTION BAG 5/6 LOADING SMALL OR MEDIUM SADDLE PACK (ALT # 10900)	DAY DOTS INTERNATIONAL							
8304165		CAULIFLOWER, WHITE FLORET POLY PACK FRESH REF	CROSS VALLEY FARM							
9372855		TOMATO, 5/6 2 LAYER #1 GRADE ROUND FRESH REF	CROSS VALLEY FARM							
4097690		BANANA, TURB FRESH REF	CROSS VALLEY FARM							
4701774		TOMATO, CHERRY BULK FRESH REF	CROSS VALLEY FARM							
3603625		LEMON, CHOICE WHOLE FRESH REF	CROSS VALLEY FARM							
9302230		LETTUCE, ROMAINE CHOPPED 1 1/4" PELLOW PACK FRESH REF (ALT # 104000)	CROSS VALLEY FARM							
1306438		ONION, GREEN TRIMMED ICELESS FRESH REF SCALLION (ALT # 103700)	CROSS VALLEY FARM							
8303696		ONION, YELLOW JUMBO 3" BAG FRESH REF (ALT # 104100)	CROSS VALLEY FARM							
2306700		POTATO, RUSSET IDAHO 40 COUNT 16-19 OZ FRESH REF (ALT # 103600)	CROSS VALLEY FARM							
GL Total: 15Prdc - Produce										
GL20Groc - Groceries										
4571883		COBBLER, CHERRY RAW FOL PAN FROZEN	HELLTOP HEARTH	4/5 LB	CS	4/5 Lbs	3.00	0.00	\$58.50	\$175.50
696728		COBBLER, APPLE RAW FOL PAN FROZEN	HELLTOP HEARTH	4/5 LB	CS	4/5 Lbs	3.00	0.00	\$44.11	\$132.33
Grand Total: TRAINING-US FOOD.COM (21004262)										

Inventory Cost – GL# without Subtotal Detail – Ascending

Inventory Cost - 01/01/2014

Customer: TRAINING-US FOOD.COM (21004262)

Division: CHICAGO (2099)

Product

Status

Description

Brand

Pack Size

UOM

Units/Full

Full

Part

Cost

Extended

GL Total: 10Meat - Meats

GL Total: 15Prdc - Produce

GL Total: 20Groc - Groceries

GL Total: 30Chem - Chemicals and Cleaning

GL Total: 40Papr - Paper

GL Total: 50Eqmt - Equipment

Grand Total: TRAINING-US FOOD.COM (21004262)

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Inventory Cost - 01/01/2014

Customer: TRAINING-US FOOD.COM (21004262) Division: CHICAGO (2099)

Product Status Descriptic Brand Pack Size UOM Units/Full Full Part Cost Extended

Inventory 2014

3710274 BEEF, BRISIBP-IOWA 5/14 LBA CS 1/LB 2 0 \$3.47 \$437.29

4101101 CHICKEN, TYSON 10.31 LB CS 250/CS 1 0 \$34.10 \$34.10

313569 PORK, RIB MAPLE LE/36 LBA CS 1/LB 1 0 \$3.22 \$115.92

1792399 BEEF SUB, CHEF'S LIN 36/4.25 OZ CS 1/CS 2 0 \$59.24 \$118.48

4383055 BEEF, PAT CATTLEM/40/4 OZ CS 1/CS 2 0 \$62.73 \$125.46

9164641 BEEF SUB, MORNING/4/12/3.3 CS 4/CS 2 0 \$72.10 \$144.20

3326436 KALE, CUR CROSS VA 4/2.5 LB CS 4/CS 5 0 \$0.00 \$0.00

3419660 CUCUMBER CROSS VA 5 LB CS 1/CS 1 0 \$20.45 \$20.45

4725818 CUCUMBER CROSS VA 5 LB CS 0/N/A 1 0 \$0.00 \$0.00

4691770 STAND, P/DAY DOTS 1 EA EA 1/EA 1 0 \$36.21 \$36.21

8326415 CAULIFLO/CROSS VA 2/3 LB CS 2/CS 1 0 \$21.67 \$21.67

9372855 TOMATO, CROSS VA 20 LB CS 1/CS 1 0 \$36.91 \$36.91

4037560 BANANA, PACKER 10 LB CS 10/CS 2 0 \$13.31 \$26.62

4731774 TOMATO, CROSS VA 10 LB CS 1/CS 1 0 \$35.06 \$35.06

3603925 LEMON, C CROSS VA 12 EA CS 1/CS 1 0 \$0.00 \$0.00

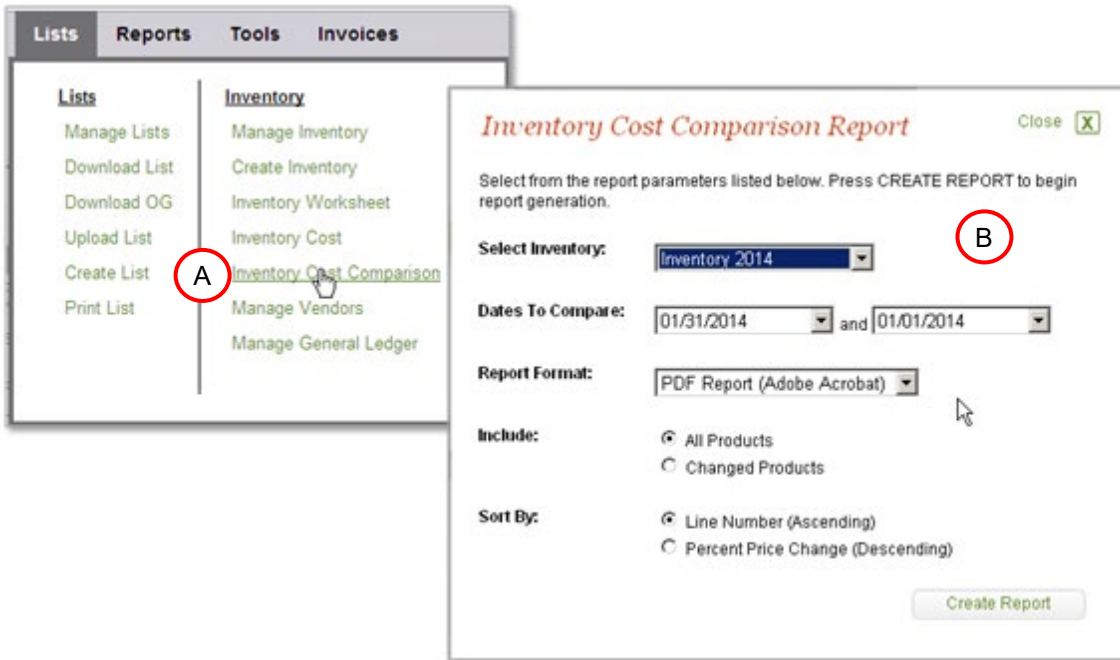
9332230 LETTUCE, I CROSS VA 6/2 LB CS 6/CS 1 0 \$28.99 \$28.99

Inventory Cost Comparison Report

- This report compares the pricing of items within the current inventory to a previous inventory. You may choose to display only those items that have changed in price.

A. Click on Inventory Cost

B. Select report options



Inventory Cost Comparison Report Close [X]

Select from the report parameters listed below. Press CREATE REPORT to begin report generation.

Select Inventory: Inventory 2014 B

Dates To Compare: 01/31/2014 and 01/01/2014

Report Format: PDF Report (Adobe Acrobat)

Include:

- ☒ All Products
- ☐ Changed Products

Sort By:

- ☒ Line Number (Ascending)
- ☐ Percent Price Change (Descending)

Create Report


Inventory Cost Comparison – All Products

Inventory Cost Comparison													
Customer: TRAINING-US FOOD.COM (21004262) Division: CHICAGO (2099)													
Product	Status	Description	Brand	Pack Size	Vendor	Units	01/31/2014	01/01/2014	\$ Full	\$ Part	\$ Full	\$ Part	% Chg
996728		COBBLER, APPLE RAW FOIL PAN FROZEN	HILLTOP HEARTH	4/5 LB	USF	1/CS	\$44.11	\$44.11	\$44.11	\$11.03	\$0.00	\$0.00	0%
996728		COBBLER, APPLE RAW FOIL PAN FROZEN	HILLTOP HEARTH	4/5 LB	USF	1/CS	\$44.11	\$44.11	\$44.11	\$44.11	\$0.00	\$0.00	0%
1400571		DRINK BASE, LEMONADE 5 L LIGHT BAG-IN-BOX (SHELF STABLE	MINUTE MAID	5 GA	USF	1/CS	\$103.84	\$103.84	\$103.84	\$103.84	\$0.00	\$0.00	0%
3304396		KALE, CURLY GREEN CLEANED & TRIMMED POLY PACK FRESH REF	CROSS VALLEY FARMS	4/2.5 LB	USF	4/CS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
3710274		BEEF, BRISKET FULL SELECT 120 DECKLE OFF RAW REF (ALT # 100600)	IBP-CROSS VALLEY	5/14 LBA	USF	1/LB	\$3.48	\$3.48	\$3.47	\$3.47	\$0.01	\$0.01	29%
4328654		BEAN, GREEN ITALIAN OUT CAN	MONARCH	6/10 CN	USF	6/CS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
4571683		COBBLER, CHERRY RAW FOIL PAN FROZEN	HILLTOP HEARTH	4/5 LB	USF	1/CS	\$14.63	\$14.63	\$14.63	\$0.31	\$0.31	\$0.31	53%
4571683		COBBLER, CHERRY RAW FOIL PAN FROZEN	HILLTOP HEARTH	4/5 LB	USF	1/CS	\$14.63	\$14.63	\$14.63	\$0.31	\$0.31	\$0.31	53%
4985693		CHEESE, CHEDDAR MILD SLICED 7.5 OZ TRAY	GLENVIEW FARMS	4/2.5 LB	USF	4/CS	\$45.00	\$45.00	\$45.00	\$11.25	\$40.10	\$11.25	-22%
9164641		BAG, FOOD STORAGE 8.5X7 UTILITY FLIP TOP CLEAR PLASTIC	HANDMADE	2000 EA	USF	10/CS	\$37.24	\$37.24	\$37.24	\$3.72	\$3.72	\$0.00	0%
9650342		CHAFER, FOOD FULL SIZE RECTANGLE WIRE POP UP SET (ALT # 110700)	STERNO	4/1 ST	USF	1/CS	\$87.60	\$87.60	\$87.60	\$87.60	\$0.00	\$0.00	0%
646331		DISPENSER, NAPKIN 7.8X5.8X2 PLASTIC TABLETOP RED	XPRESSNAP (ALT # 110700)										
1328038		DRINK MIX, LEMONADE 2 GAL VIAL POWDER POUCH	CARRIER, DRINK & CUP 8 OZ MOLDED FIBER W/ HANDLE										
1499680		CARRIER, DRINK & CUP 8 OZ MOLDED FIBER W/ HANDLE	CRUISER MOVER PAPER (ALT # 110400)										
3419680		CARROT, JUMBO #1 GRADE BAG FRESH REF											
3587573		CHEESE, PARMESAN SHRED BAG REF IMPORTED ARGENTINA											
4101101		CHICKEN, NUGGET DINOSAUR SHAPED 86 OZ BREADED											
		BREAST MEAT CHILD-NUTRITION (ALT # 101100)											
Product	Status	Description	Brand	Pack Size	Vendor	Units	01/31/2014	01/01/2014	\$ Full	\$ Part	\$ Full	\$ Part	% Chg
5		996728	COBBLER, HILLTOP H4/5 LB	USF	1/CS	\$44.11	\$44.11	\$44.11	\$11.03	\$0.00	\$0.00	\$0.00	0%
6		996728	COBBLER, HILLTOP H4/5 LB	USF	1/CS	\$44.11	\$44.11	\$44.11	\$11.03	\$0.00	\$0.00	\$0.00	0%
7		1400571	DRINK BA/ MINUTE N 5 GA	USF	1/CS	\$103.84	\$103.84	\$103.84	\$103.84	\$0.00	\$0.00	\$0.00	0%
8		3326436	KALE, CUR CROSS VA 4/2.5 LB	USF	4/CS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
9		3710274	BEEF, BRIS IBP-IOWA 5/14 LBA	USF	1/LB	\$3.48	\$3.48	\$3.47	\$3.47	\$0.01	\$0.01	\$0.01	29%
10		4328654	BEAN, GRIMONARCH 6/10 CN	USF	6/CS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
11		4571683	COBBLER, HILLTOP H4/5 LB	USF	4/5 lbs	\$58.81	\$14.70	\$58.81	\$14.63	\$0.31	\$0.31	\$0.31	53%
12		4571683	COBBLER, HILLTOP H4/5 LB	USF	4/5 lbs	\$58.81	\$14.70	\$58.81	\$14.63	\$0.31	\$0.31	\$0.31	53%
13		4985693	CHEESE, GLENVIEW 4/2.5 LB	USF	4/CS	\$45.00	\$11.25	\$45.00	\$11.25	\$40.10	\$11.25	\$40.10	-22%
14		8004574	BAG, FOOD STORAGE 8.5X7 UTILITY FLIP TOP CLEAR PLASTIC	USF	10/CS	\$37.24	\$3.72	\$37.24	\$3.72	\$0.00	\$0.00	\$0.00	0%
15		9650342	CHAFER, PAPER 4/1 ST	USF	1/CS	\$87.60	\$87.60	\$87.60	\$87.60	\$0.00	\$0.00	\$0.00	0%
16		646331	DISPENSE/TORK 4/1 EA	USF	1/CS	\$18.29	\$18.29	\$18.29	\$18.29	\$0.00	\$0.00	\$0.00	0%
17		1328038	DRINK MIX/THIRSTER/ 12/24 OZ	USF	12/CS	\$36.21	\$3.02	\$36.21	\$3.02	\$0.00	\$0.00	\$0.00	0%
18		1499680	CARRIER, I/PACTIV 300 EA	USF	1/CS	\$62.65	\$62.65	\$62.65	\$62.65	\$0.00	\$0.00	\$0.00	0%
19		3419660	CARROT, J CROSS VA 25 LB	USF	1/CS	\$20.45	\$20.45	\$20.45	\$20.45	\$0.00	\$0.00	\$0.00	0%
20		3587573	CHEESE, P ROSELI 4/5 LB	USF	4/CS	\$114.49	\$28.62	\$114.49	\$28.62	\$28.50	\$0.49	\$0.49	0.43%
21		4101101	CHICKEN, TYSON 10.31 LB	USF	250/CS	\$34.20	\$0.14	\$34.10	\$0.14	\$0.10	\$0.10	\$0.10	29%

Inventory Cost Comparison – Changes Only

Inventory Cost Comparison													
Customer: TRAINING-US FOOD.COM (21004262) Division: CHICAGO (2099)													
Product	Status	Description	Brand	Pack Size	Vendor	Units	01/31/2014	01/01/2014	\$ Full	\$ Part	\$ Full	\$ Part	% Chg
4571683		COBBLER, CHERRY RAW FOIL PAN FROZEN	HILLTOP HEARTH	4/5 LB	USF	1/CS	\$58.81	\$14.70	\$58.81	\$14.63	\$0.31	\$0.31	53%
4571683		COBBLER, CHERRY RAW FOIL PAN FROZEN	HILLTOP HEARTH	4/5 LB	USF	1/CS	\$58.81	\$14.70	\$58.81	\$14.63	\$0.31	\$0.31	53%
3587573		CHEESE, PARMESAN SHRED BAG REF IMPORTED ARGENTINA					\$114.49	\$28.62	\$114.49	\$28.62	\$28.50	\$0.49	0.43%
3710274		BEEF, BRISKET FULL SELECT 120 DECKLE OFF RAW REF (ALT # 100600)	IBP-CROSS VALLEY	5/14 LBA	USF	1/LB	\$3.48	\$3.48	\$3.47	\$3.47	\$0.01	\$0.01	29%
4101101		CHICKEN, NUGGET DINOSAUR SHAPED 86 OZ BREADED	TYSON	10.31 LB	USF	250/CS	\$34.20	\$0.14	\$34.10	\$0.14	\$0.10	\$0.10	29%
4985693		CHEESE, CHEDDAR MILD SLICED 7.5 OZ TRAY YELLOW REF	GLENVIEW FARMS	4/2.5 LB	USF	4/CS	\$45.00	\$11.25	\$45.00	\$11.25	\$40.10	\$11.25	-22%
9164641		BEEF SUB, PATTY MEATLESS BURGER BLACK BEAN SPICY	MORNINGSTAR FARMS	4/12X3.3 OZ	USF	4/CS	\$71.10	\$17.78	\$72.10	\$18.03	\$1.00	\$1.00	-1.41%
6340301		BREAD, WHITE 4.25X4.5" 17 SLICED 34" LOAF BAKED FROZEN	HILLTOP HEARTH	10/24 OZ	USF	10/CS	\$36.28	\$3.63	\$37.28	\$3.73	\$1.00	\$1.00	-2.76%
		TEXAS TOAST											
Product	Status	Description	Brand	Pack Size	Vendor	Units	01/31/2014	01/01/2014	\$ Full	\$ Part	\$ Full	\$ Part	% Chg
5		4571683	COBBLER, HILLTOP H4/5 LB	USF	4/5 lbs	\$58.81	\$14.70	\$58.81	\$14.63	\$0.31	\$0.31	\$0.31	53%
6		4985693	CHEESE, C GLENVIEW 4/2.5 LB	USF	4/CS	\$45.00	\$11.25	\$45.00	\$11.25	\$40.10	\$11.25	\$40.10	-22%
7		3710274	BEEF, BRIS IBP-IOWA 5/14 LBA	USF	1/LB	\$3.48	\$3.48	\$3.47	\$3.47	\$0.01	\$0.01	\$0.01	29%
8		4101101	CHICKEN, TYSON 10.31 LB	USF	250/CS	\$34.20	\$0.14	\$34.10	\$0.14	\$0.10	\$0.10	\$0.10	29%
9		3587573	CHEESE, P ROSELI 4/5 LB	USF	4/CS	\$114.49	\$28.62	\$114.49	\$28.62	\$28.50	\$0.49	\$0.49	0.43%
10		4571683	COBBLER, HILLTOP H4/5 LB	USF	1/CS	\$58.81	\$14.70	\$58.81	\$14.63	\$0.31	\$0.31	\$0.31	53%
11		6340301	BREAD, W HILLTOP H 10/24 OZ	USF	10/CS	\$36.28	\$3.63	\$37.28	\$3.73	\$1.00	\$1.00	\$1.00	-2.76%
12		9164641	BEEF SUB, MORNING 4/12/3.3 C	USF	4/CS	\$71.10	\$17.78	\$72.10	\$18.03	\$1.00	\$1.00	\$1.00	-1.41%

Inventory Cost Report – Summary



Inventory Cost - 01/01/2014

Customer: TRAINING-US FOOD.COM (21004262)

Division: CHICAGO (2099)

Product	Status	Description	Brand	Pack Size	UOM	Units/Full	Full	Part	Cost	Extended
GL Total: 10Meat - Meats										\$974.81
GL Total: 15Prdc - Produce										\$291.32
GL Total: 20Groc - Groceries										\$3413.13
GL Total: 30Chem - Chemicals and Cleaning										\$865.68
GL Total: 40Papr - Paper										\$1490.30
GL Total: 50Eqmt - Equipment										\$200.18
Grand Total: TRAINING-US FOOD.COM (21004262)										\$7235.42

Inventory Cost Report – Extended

The “Inventory Cost Report – Extended” was created for owner/managers of 2 or more locations who want to get the most up to date inventory reports from all locations.

This extended cost report allows managers to:

- Pull all active inventory reports for a 5 day date range across multiple locations and divisions
- Pull all key report elements in one Excel / CSV report including

Eliminates the need for location managers to email completed inventories

The report includes the following:

Division Number	Group Name	Manufacturer Product #	Inventory Units on hand
Division Name	Product Number	Net Weight	UOM
Customer Number	List Line #	Vendor	Case cost
Customer Name	Product Description	Daily Par Values	Extended cost
List Name	Brand	Reference # or note	GL Code
Inventory Date	Pack Size	Inventory Units per case	GL Description

1. Verify that all locations have finished entering inventories into US Foods Online.
2. Click on Lists
3. Click on Inventory Cost Report – Extended
4. The Inventory Cost – Extended pop up box will appear.

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Inventory Cost Report - Extended Close X

Select from the report parameters listed below. Press CREATE REPORT to begin report generation.
Please enter the dates such that the difference between the Start and End dates should be less than or equal to 5 days.

Start Date:

End Date:

☐ Include lists with zero inventory values

Report Format:

Create Report

5. Set the start and end date to match the date of the inventory
6. "Include lists with zero inventory values" – optional.
7. Choose the **Report Format**:
CSV Report
8. Click on Create Report.

Inventory Cost Report - Extended Close X

Select from the report parameters listed below. Press CREATE REPORT to begin report generation.
Please enter the dates such that the difference between the Start and End dates should be less than or equal to 5 days.

Start Date: 5 09/16/2014

End Date: 09/16/2014

☒ **Include lists with zero inventory values** 6

Report Format: 7 CSV Report (EXCEL)

8 **Create Report**

9. The downloaded file is a data file and must be manipulated to add subtotals and eliminate any unneeded data columns

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
1	Inventory Cost Report - Extended - BUDSCORP (10291846)																	
2	DivNbr	DivName	CustNbr	CustName	ListName	InvyDate	GrpName	Product	Line #	Descrip	Brand	PackSz	MfrPro	NetWt	Vendor	Sun	Mon	Tue
3	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	7790215	1 SAUSAGE, BUD'S BARBECUI	15 LB	44404	15	USF						
4	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	7796956	2 CHICKEN, BUD'S BARBECUI	4/10 LB	8402	40	USF						
5	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	7795925	3 HAM, BON BUD'S BARBECUI	6/6.5 LBA	023233-16	39	USF						
6	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	7764863	4 SAUSAGE, BUD'S BARBECUI	15 LB	44408	15	USF						
7	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	2447019	5 PORK, SPA FARMLAND	30 LBA	7.02E+10	30.8	USF						
8	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	3710274	6 BEEF, BRIS IBP-IOWA BEEF	F 5/14 LBA	D7104AH	63.01	USF						
9	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	7796824	7 TURKEY, B BUD'S BARBECUI	4/10 LBA	75753	40	USF						
10	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	7858970	8 PORK, BO'S BUD'S BARBECUI	5/15 LBA	702477095	75.4	USF						
11	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	3194909	9 CHICKEN, PERDUE	2/5 LB	80120	10	USF						
12	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	2263614	10 BACON, PK PACKER	10 LB		10	USF						
13	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	1710052	11 BACON, PK RYT-WAY	6/1 LB	F8882630	6	USF			0	0		
14	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	7768674	12 BAKED PO BUD'S BARBECUI	4/5 LB	71117.15	20	USF						
15	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	7841281	13 BEAN, BAK BUD'S BARBECUI	6/#10 CN	3123	43.13	USF						
16	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	7841661	14 BEAN, BAK BUD'S BARBECUI	6/#10 CN	3130	40.5	USF						
17	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	8875783	15 BEAN, GRE ALLENS	6/#10 CN	1255001	39.38	USF						
18	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	7780588	16 BUN, HMB BUD'S BARBECUI	6/30/3 OZ	51681	33.75	USF						
19	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	1332634	17 CHEESE, C GLENVIEW FARM	4/5 LB	73570	20	USF						
20	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	4985693	18 CHEESE, C GLENVIEW FARM	4/2.5 LB	346279	10	USF						
21	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	9753971	19 CHIP, ASSC FRITO LAY	2/30 EA	52347	6.44	USF						
22	3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	2046365	20 SAUCE, HCTEXAS PETE	4/1 GA	10.012	34.8	USF						

Inventory Cost Report – Extended with Subtotals

Excel can be used to apply subtotals to the Inventory Cost Report – Extended. To do this, open the report in Excel.

1. Click on the Data from the main menu
2. Click on Subtotals

inventoryCostExtendedReport.csv - Microsoft Excel

File Home Insert Page Layout Formulas **Data** Review View Add-Ins ASAP Utilities Smart View Nuance PDF Acrobat

From Access From Web From Text From Other Sources Existing Connections Refresh All Edit Links Connections Sort & Filter Filter Reapply Advanced Text to Columns Remove Duplicates Data Validation Consolidate What-If Analysis Group Ungroup Subtotal Outline Show Detail Hide Detail

A1 Inventory Cost Report - Extended - TX616LUFKIN (10291657)

DivNbr	DivName	CustNbr	CustName	ListName	InvyDate	GrpName	Product	Line #	Descrip	Brand	PackSz	MfrPro	NetWt	Vendor	Sun	Mon	Tue
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	7790215	1 SAUSAGE, BUD'S BARBECUI	15 LB	44404	15 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	7796956	2 CHICKEN, BUD'S BARBECUI	4/10 LB	8402	40 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	7795925	3 HAM, BON BUD'S BARBECUI	6/6.5 LBA	023233-16	39 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	7764863	4 SAUSAGE, BUD'S BARBECUI	15 LB	44408	15 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	2447019	5 PORK, SPA FARMLAND	30 LBA	7.02E+10	30.8 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	3710274	6 BEEF, BRIS IBP-IOWA BEEF	F.5/14 LBA	D7104AH	63.01 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	7796824	7 TURKEY, B BUD'S BARBECUI	4/10 LBA	75753	40 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	7858970	8 PORK, BOS BUD'S BARBECUI	5/15 LBA	70247709	75.4 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	3194909	9 CHICKEN, PERDUE	2/5 LB	80120	10 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	2263614	10 BACON, PC PACKER	10 LB		10 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	MEATS	1710052	11 BACON, PC RYT-WAY	6/1 LB	F8882630	6 USF					0		0
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	7768674	12 BAKED PO BUD'S BARBECUI	4/5 LB	71117.15	20 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	7841281	13 BEAN, BAK BUD'S BARBECUI	6/#10 CN	3123	43.13 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	7841661	14 BEAN, BAK BUD'S BARBECUI	6/#10 CN	3130	40.5 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	8875783	15 BEAN, GRE ALLENS	6/#10 CN	1255001	39.38 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	7780588	16 BUN, HMB BUD'S BARBECUI	6/30/3 OZ	51681	33.75 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	1332634	17 CHEESE, C GLENVIEW FARM	4/5 LB	73570	20 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	4985693	18 CHEESE, C GLENVIEW FARM	4/2.5 LB	346279	10 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	9753971	19 CHIP, ASSC FRITO LAY	2/30 EA	52347	6.44 USF							
3147	MEMPHIS	91092460	BUDS AL # Inventory	11/1/2014	GROCERY PRODUCE	2046365	20 SAUCE, HC TEXAS PETE	4/1 GA	10.012	34.8 USF							

3. Select the following options:
 - a) At each change in: GrpName
 - b) Use function: Sum
 - c) Add subtotal to: ExtPrc
 - d) Check – Replace current subtotal
 - e) Check – Summary below data
 - f) Click on OK

5336029 3 BACON, PC PATUXENT 2/5 LB

Subtotal

At each change in:
GrpName

Use function:
Sum

Add subtotal to:
☐ Cost
☒ ExtPrc
☐ GLCode
☐ GLDesc
☐ PrdSts
☐ CatchWtFlag

☒ Replace current subtotals
☐ Page break between groups
☒ Summary below data

Remove All OK Cancel

4. The report will show sub totals for each group.

1	2	3	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1			Inventory Cost Report - Extended - BUDSCORP (10291846)														
2			DivNbr	DivNam	CustNbr	CustNam	ListNam	InvyDate	GrpName	Product	Line #	Descrip	Brand	PackSz	MfrPro	NetWt	Vendor
3			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	MEATS	7790215	1	SAUSAGE, BUD'S BARBECUI	15 LB		44404	15	USF
4			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	MEATS	7796956	2	CHICKEN, BUD'S BARBECUI	4/10 LB		8402	40	USF
5			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	MEATS	7795925	3	HAM, BON BUD'S BARBECUI	6/6.5 LBA	023233-16		39	USF
6			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	MEATS	7764863	4	SAUSAGE, BUD'S BARBECUI	15 LB		44408	15	USF
7			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	MEATS	2447019	5	PORK, SPA FARMLAND	30 LBA		7.02E+10	30.8	USF
8			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	MEATS	3710274	6	BEEF, BRIS IBP-IOWA BEEF	F 5/14 LBA	D7104AH		63.01	USF
9			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	MEATS	7796824	7	TURKEY, B BUD'S BARBECUI	4/10 LBA		75753	40	USF
10			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	MEATS	7858970	8	PORK, BOS BUD'S BARBECUI	5/15 LBA	702477095		75.4	USF
11			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	MEATS	3194909	9	CHICKEN, PERDUE	2/5 LB		80120	10	USF
12			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	MEATS	2263614	10	BACON, P(C PACKER	10 LB			10	USF
13			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	MEATS	1710052	11	BACON, P(C RYT-WAY	6/1 LB		F8882630	6	USF
14									MEATS Total								
15			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	GROCERY PRODUCE	7768674	12	BAKED PO BUD'S BARBECUI	4/5 LB		71117.15	20	USF
16			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	GROCERY PRODUCE	7841281	13	BEAN, BAK BUD'S BARBECUI	6/#10 CN		3123	43.13	USF
17			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	GROCERY PRODUCE	7841661	14	BEAN, BAK BUD'S BARBECUI	6/#10 CN		3130	40.5	USF
18			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	GROCERY PRODUCE	8875783	15	BEAN, GRE ALLENS	6/#10 CN		1255001	39.38	USF
19			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	GROCERY PRODUCE	7780588	16	BUN, HMB BUD'S BARBECUI	6/30/3 OZ		51681	33.75	USF
20			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	GROCERY PRODUCE	1332634	17	CHEESE, C GLENVIEW FARM	4/5 LB		73570	20	USF
21			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	GROCERY PRODUCE	4985693	18	CHEESE, C GLENVIEW FARM	4/2.5 LB		346279	10	USF
22			3147	MEMPHIS	91092460	BUDS AL #	Inventory	11/1/2014	GROCERY PRODUCE	9753971	19	CHIP, ASSC FRITO LAY	2/30 EA		52347	6.44	USF

Upload an Inventory Worksheet with Non USF Products

Users now have the ability to upload inventory data elements for any list of products that will be used to take inventory. The downloaded CSV version of Inventory Worksheet acts as a template to upload the data.

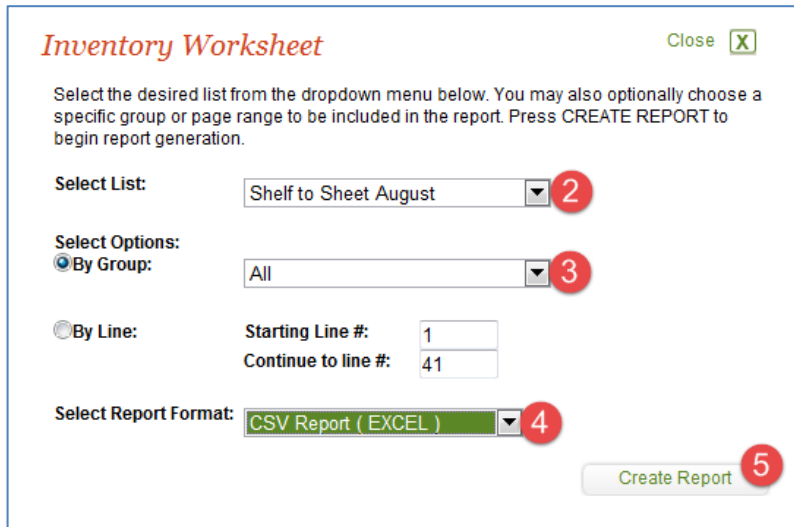
*Note – The upload process now supports the upload of USF products and **Non-USF products**.*

Process overview

- Select and download an existing list to use as a template
- Edit list with new products, sort order, update or add par levels, GL codes, inventory units and price overrides
- Upload new Inventory Worksheet

Process details

- A. Select and download an existing list to use as a template
1. From the Lists menu, select Inventory Worksheet
 2. Select the list to use as a template



Inventory Worksheet Close X

Select the desired list from the dropdown menu below. You may also optionally choose a specific group or page range to be included in the report. Press CREATE REPORT to begin report generation.

Select List: Shelf to Sheet August 2

Select Options:

☒ By Group: All 3

☐ By Line: Starting Line #: 1 Continue to line #: 41

Select Report Format: CSV Report (EXCEL) 4

Create Report 5

3. Select Options: By Group 3 up "All"
4. Select Report Format: CSV Report
5. Click on "Create Report"

B. Edit list with new products, sort order, update or add par levels, GL codes, inventory units and price overrides

1. Inventory Worksheet / Customer - The upload process will ignore the list name and customer info. You do not need to delete or make any changes to this information.
2. Group – The upload process will upload the group name assigned to the product. Group names are limited to 25 characters and cannot contain the following characters: # \$ % ^ & * . The upload process will group all of the products with the same group name in sequential order even if they are out of order in the upload file.
3. Add/delete products – add new products or delete products from the worksheet. When adding products, only the group and product number are required.
4. Line number – not required for upload. The worksheet will be uploaded by group and in the same order as the product appears in the list. The line number does not affect the upload order.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Inventory Worksheet - Shelf to Shelf August															
2	Customer: TRAINING-US FOOD.COM (21004262) Division: CHICAGO (2099)															
3	Group	Product	Line #	Status	Description	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Brand	Reference	Pack Size	Last Buy D OnH
4	Back Cooler	5740139	1		AVOCADO, PULP POUCH REF								EL PASADO/DEL PASADO		4/4 LB	
5	Back Cooler	6773501	2		TART, APPLE RUSTIC 4" SS BAKED TRAY FROZEN								CHEF'S LINE		3/8/6.3 OZ	
6	Back Cooler	877563	3		BUTTER, CONTINENTAL CHIP 47 COUNT SALTED SS FOIL								GLENVIEW FARMS		4/4.25 LB	
7	Back Cooler	3721008	4		SEAWEED, DRIED NORI MOMO FULL SHEET								MARU-KYO		10/50 EA	
8	Back Cooler	4571600	5		COBBLER, PEACH RAW FOIL PAN FROZEN ARTIFICIALLY F								HILLTOP HEARTH/DEVOI		4/80 OZ	
9	Back Cooler	3934353	6		BREAD, FLAT NAAN ROASTED GARLIC TANDOORI 4.4 OZ								CHEF'S LINE		6/8/4.4 OZ	
10	Back Cooler	1569425	7		TURKEY, BREAST WHOLE MUSCLE PAN SKINLESS COOKE								METRO DELI		2/8 LBA	
11	Back Cooler	3934320	8		BREAD, FLAT NAAN TANDOORI 4.4 OZ TEARDROP BAKED								CHEF'S LINE		6/8/4.4 OZ	
12	Back Cooler	3897998	9		EMPANADA, STEAK & CILANTRO MINI PARFRIED FROZEN								MOLLY'S KITCHEN		4/27/1.5 OZ	
13	Meat Freezer	3938214	10		HAM, BONELESS D-SHAPED SMOKED APPLEWOOD REF D								METRO DELI		2/7 LBA	
14	Meat Freezer	6763601	11		BACON, PORK COOKED 150 COUNT HARDWOOD SMOKE								PATUXENT FARMS		2/150 EA	
15	Meat Freezer	1792431	12		BEEF SUB, PATTY MEATLESS VEGETABLE 3 GRAIN COOKE								CHEF'S LINE		54/1.8 OZ	
16	Meat Freezer	1776855	13		PORK, SHOULDER BUTT BONELESS COOKED PIT APPLEW								CHEF'S LINE		2/4.5 LBA	
17	Meat Freezer	1794296	14		SALMON, PATTY 4 OZ PINK & KETA RAW IQF FROZEN US								CHEF'S LINE		2/5 LB	
18	Back Cooler	2001444	15		PICKLE, DILL CRINKLE-CUT CHIP 2730-3050 COUNT 1/8"								MONARCH		5 GA	
19	Meat Freezer	1792390	16		BEEF SUB, PATTY MEATLESS VEGETABLE 3 GRAIN COOKE								CHEF'S LINE		36/4.25 OZ	

5. Status # – information is ignored in this column
6. Description – information is ignored in this column
7. Par Levels – information is optional
8. Brand – information is ignored
9. Reference – information is optional. Use this field for a product notes or reference number.
10. Pack size – information is ignored

11. Last Buy - information is ignored
12. On Hand - information is ignored

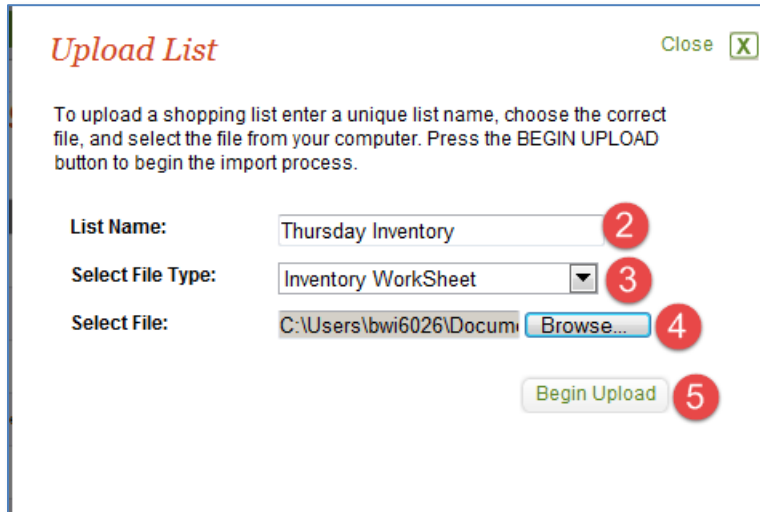
Inventory Worksheet - Shelf to Sheet August																
Customer: TRAINING-US FOOD.COM (21004262) Division: CHICAGO (2099)																
Group	Product	Line #	Status	Description	Unit	11 Last Buy D	12 OnHand/C	13 Full	14 \$Part	15 Units/Full	16 GL	17 Vendor				
Back Cooler	5740139	1		AVOCADO, PULP POUCH REF				\$68.06 CS	\$0.00 EA	4/CS	15prdc	USF				
Back Cooler	6773501	2		TART, APPLE RUSTIC 4" SS BAKED TRAY FROZEN	OZ			\$71.83 CS	\$0.00 EA	3/CS	15prdc	USF				
Back Cooler	877563	3		BUTTER, CONTINENTAL CHIP 47 COUNT SALTED SS FOIL	LB			\$87.16 CS	\$0.00 EA	4/CS	20groc	USF				
Back Cooler	3721008	4		SEAWEED, DRIED NORI MOMO FULL SHEET				\$94.52 CS	\$10.87 EA	10/CS	15prdc	USF				
Back Cooler	4571600	5		COBBLER, PEACH RAW FOIL PAN FROZEN ARTIFICIALLY F				\$50.36 CS	\$0.00 EA	4/CS	20groc	USF				
Back Cooler	3934353	6		BREAD, FLAT NAAN ROASTED GARLIC TANDOORI 4.4 OZ	OZ			\$54.30 CS	\$0.00 EA	6/CS	20groc	USF				
Back Cooler	1569425	7		TURKEY, BREAST WHOLE MUSCLE PAN SKINLESS COOKE	EA			\$6.04 LB	\$0.00 EA	2/LB	10meat	USF				
Back Cooler	3934320	8		BREAD, FLAT NAAN TANDOORI 4.4 OZ TEARDROP BAKED	OZ			\$48.33 CS	\$0.00 EA	6/CS	20groc	USF				
Back Cooler	3897998	9		EMPANADA, STEAK & CILANTRO MINI PARFRIED FROZEN	5 OZ			\$122.51 CS	\$0.00 EA	4/CS	20groc	USF				
Meat Freezer	3938214	10		HAM, BONELESS D-SHAPED SMOKED APPLEWOOD REF C				\$6.04 LB	\$0.00 EA	2/LB	10meat	USF				
Meat Freezer	6763601	11		BACON, PORK COOKED 150 COUNT HARDWOOD SMOKE				\$53.42 CS	\$0.00 EA	1/CS	10meat	USF				
Meat Freezer	1792431	12		BEEF SUB, PATTY MEATLESS VEGETABLE 3 GRAIN COOKE	OZ			\$42.58 CS	\$0.00 EA	1/CS	10meat	USF				
Meat Freezer	1776855	13		PORK, SHOULDER BUTT BONELESS COOKED PIT APPLEW	BA			\$7.30 LB	\$0.00 EA	2/LB	10meat	USF				
Meat Freezer	1794296	14		SALMON, PATTY 4 OZ PINK & KETA RAW IQF FROZEN US				\$79.51 CS	\$0.00 EA	2/CS	10meat	USF				
Back Cooler	2001444	15		PICKLE, DILL CRINKLE-CUT CHIP 2730-3050 COUNT 1/8"				\$32.45 CS	\$0.00 EA	1/CS	20groc	USF				
Meat Freezer	1792399	16		BEEF SUB, PATTY MEATLESS VEGETABLE 3 GRAIN COOKE	OZ			\$59.25 CS	\$0.00 EA	1/CS	10meat	USF				
Meat Freezer	1782242	17		BEEF, PATTY CHOPPED CHUCK & SHORT RIB CHOICE AN				\$84.81 CS	\$0.00 EA	1/CS	10meat	USF				
Ice Cream Freezer	904110	18		ICE CREAM, BUTTER PECAN TUB FROZEN				\$32.72 CS	\$0.00 EA	1/CS	20groc	USF				

13. \$Full – Delete the pricing in this column. Any price uploaded will set the pricing flag to price override.
14. \$Part – Delete the pricing in this column.
15. Units / Full – these are the inventory units. This data can be edited to reflect the customers inventory units. Format is number of units / unit description.
Example: 6/pies
16. GL – Enter the product GL code. The GL codes must first be setup on the site using the Lists>Manage General Ledger function. Enter the GL # in this column – not the GL Account Name.
17. Vendor – Information in this column is ignored.

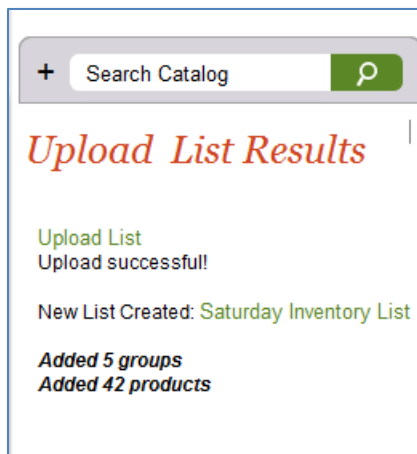
At this point in time, non-usf products cannot be uploaded. An enhancement will be made to the system in Q1 2015 to enable this function.

C. Upload the new Inventory Worksheet

1. Click on Lists>Upload List. The Upload List pop-up will appear.

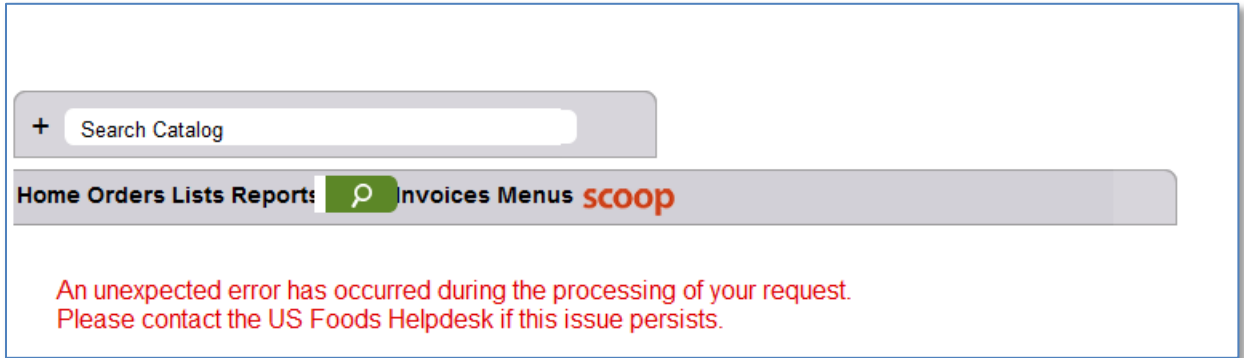


2. List name - Enter a unique name for the list
3. Select File Type – Select Inventory Worksheet
4. Select File – Click browse to navigate to the Inventory Worksheet file to upload
5. Click on begin upload.
6. After the list uploads, a message will appear:

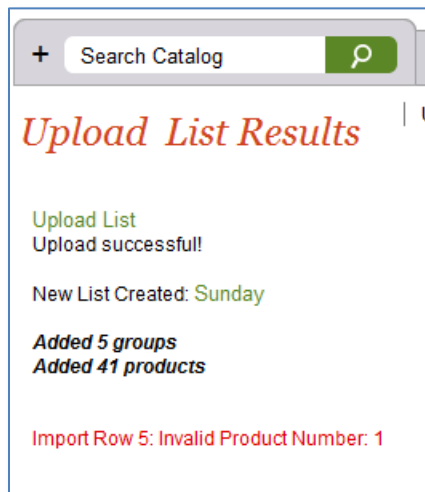


7. If the upload is successful, it will note the number of groups and products added. Click on the list name to view the list online.

8. If you have invalid characters in the group name, you will see the following message:



If you upload an invalid product number, you will see a detailed message:



Managing Lists with the List Management Application

Create a New List from Scratch

Creating a New List:

1. Select **"NEW"**
2. Type in a **"New List Name"**
 - *Recommend giving it a unique name to easily identify*
3. Click **"CREATE"**

- The **Name** of your shopping list will be displayed in the upper left.
- From this screen you can now **Add Products**.
- You can also create **Groups**.

NOTE: Groups are a great way to organize products on a list into a "Shelf to Sheet" sequence.

This type of sequence makes ordering much more efficient.

Adding Product Groups

- Click on the **"ADD GROUP+"** button.
- Type in a Group Name.
- Click the **Green Check Mark** to save.
- Repeat until you have your Groups added.

**You can always go back and add more as need.*

NOTE: The Unassigned Group will always be displayed and available for any products not assigned to a group.

New Shopping List 9-4-20

☐ Discontinued products
☐ Recently Purchased

Unassigned Group (0)
Line -

Cooler (0)
Line -

Freezer (0)
Line -

Disposables ☒ ☐

ADD GROUP +

Unassigned Group

This group contains no

[Home](#) > [Search for Products](#)

Search for Products

21 Products found for "Spicy Wing"

<input checked="" type="checkbox"/>	Line 1		CHICKEN, WING 162JT BRDO SPICY PATUXENT FARMS #2337137
<input type="checkbox"/>	Line 2		CHICKEN, WING 162JT BUFL0 SM PATUXENT FARMS #5695051

Adding Products to the List / Groups

- To add Products to your List, click on one of the Catalog options from your List Page.
 - SEARCH FOR PRODUCTS
 - ADD PRODUCTS
- Then search for the product(s) you want to add.

MY LISTS

SEARCH FOR PRODUCTS

[Home](#) > [New Shopping List 9-4-20](#)

New Shopping List 9-4-20

74)

JOHN DOE

LEARN MORE

ADD PRODUCTS

- Using the **Product Search** functions locate the item(s) you want to add to your Shopping List.
- Select the Product(s) by placing a **"Checkmark"** in the box to the Left.
- Once you select a Product (s) you will see a Green **"Action Bar"** appear at the bottom of the screen.
- Use this **Action Bar** to strategically add the Check Marked Item(s) to this list or other lists you may wish.

[Home](#) > [Search for Products](#)

Search for Products

21 Products found for "Spicy Wing"

<input checked="" type="checkbox"/>	Line 1		CHICKEN, WING 162JT BRDO SPICY PATUXENT FARMS #2337137	\$65.78 CS / 12/7.5 LB
-------------------------------------	--------	--	--	------------------------

1 Product Selected

List: New Shopping List 7-2-20

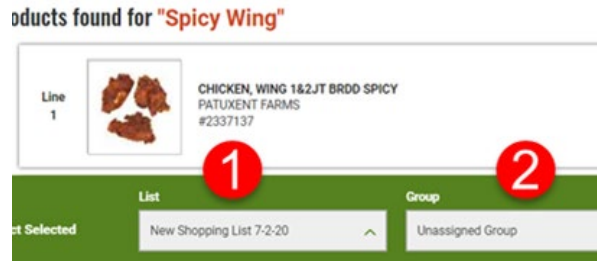
Group: Unassigned Group

Position: Top of the Group

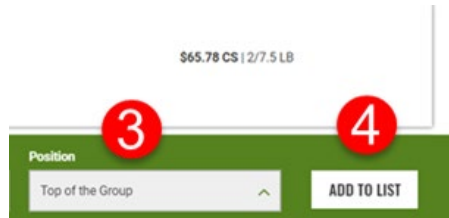
ADD TO LIST

Let's Explore the options on this **Action Bar**.

1. **List** – Choose the list you want to add the product to. It will be defaulted to the current list you are working with.
2. **Group** – Choose the Group within that List you want it to add it to. (If you have no groups it will default to “Unassigned”)



3. **Position** – Choose the Position (top or bottom) in that Group you want to product located.
4. **ADD TO LIST** - Add the selected Product(s) to the Group & List.



- Once you Click ADD TO LIST you will see a “Success” message displayed.
- From here you have the option to continue Searching and Adding products or you click “Go to List” to return to your Shopping List.

Search for Products



Inventory shopping lists and worksheets

The List Management application will keep order entry shopping lists and worksheets in synch with the inventory program. To keep shopping lists used for order entry and shopping lists used for inventory in synch, all changes to the lists **must be made through the List Management application**.

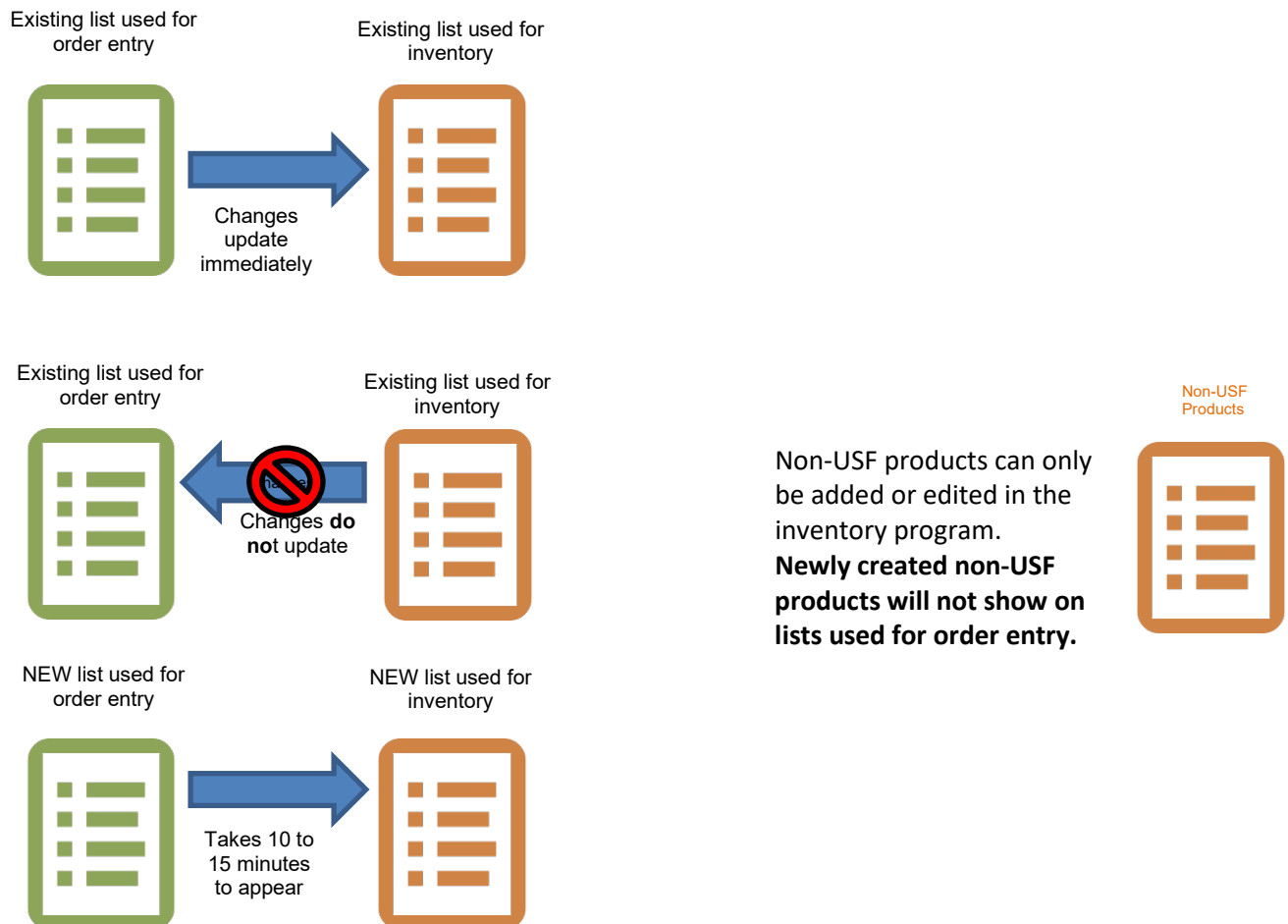
Changes made to a list on the inventory system will not update lists for order entry. Additionally, the List Management application does not support non-USF products. **Changes to non-USF products can only be made while using the inventory system.**

When a new list is created in the List Management application, **it will take about 10 to 15 minutes to appear in the Inventory program**. Changes to an existing list will be immediate. These changes include:

- Adding, deleting, copying or moving products or groups
- Renaming lists or groups

In summary:

- Changes made to lists when creating orders or when in list management will update lists used for inventory.
- Changes made to lists when in the inventory system will not update lists used for ordering.
- Non-USF products can only be added or edited in the inventory program



Frequently Asked Questions

Inventory Cost Reports

1. Non-USF products – extended pricing is not showing for these products.
Answer – Make sure that a weight has been entered in the Average Net Weight field.